

MAGENTA

choose better



**SURVEY OF AFGHAN
MEDIA PREFERENCES**
RESEARCH STUDY

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CONTENT

ACKNOWLEDGEMENTS	5
EXECUTIVE SUMMARY	6
INTRODUCTION	7
METHODOLOGY	8
Research Questions	8
Data Collection Methods	8
Reporting	8
Sample	8
Challenges and Data Limitations	13
PART I: NATIONAL MEDIA CONSUMPTION HABITS	15
General Media Consumption	15
information on justice and security services	25
PART II: INTERNET USERS	30
Section I: Use of Media Sources	30
Section II: Reasons for Using Media Sources	32
Section III: Preference for Media Sources	32
Section IV: Most Credible Social Media Sources	34
CONCLUSION	36

FIGURES & TABLES

Figure 1. Age and gender	9
Figure 2. Residential area and gender	9
Figure 3. Ethnicity	10
Figure 4. Literacy, age and gender	11
Figure 5. Education by age	12
Figure 6. Occupation status by gender	12
Figure 7. Age and gender	13
Figure 8. Frequency of use of media sources by gender and location	15
Figure 9. Hours of TV watched per day	16
Figure 10. Duration of TV viewership and gender	16
Figure 11. Time of day TV watched	17
Figure 12. Time of day for radio listenership	18
Figure 13. Reasons for watching TV	19
Figure 14. Reasons for listening to the radio	19
Figure 15. Social media channels consumption	20
Figure 16. Reasons for accessing the internet	20
Figure 17. TV channels consumption	21
Figure 18. Radio channel consumption	21
Figure 19. Trusted sources of information	22
Figure 20. % of each age group who trust or strongly trust NGOs or the UN	23
Figure 21. Who do young people trust?	23
Figure 22. Men and women respondents' contrasting views of information trustworthiness	23
Figure 23. Preferred sources of media	24
Figure 24. Trust of information from television, by age	24
Figure 25. Trust of media, by gender	25
Figure 26. Knowledge of contacting police by gender	25
Figure 27. Knowledge of contacting police by gender	26
Figure 28. Most trusted sources of information about police activities in the area	27
Figure 29. Extent to which each source of information on police activities is trusted	27
Figure 30. Usage of police services	28
Figure 31. Usage of justice services	28
Figure 32. Satisfaction with current information about justice services	29
Figure 33. Social media preferences by gender	31
Figure 34. Average hours respondents reported spending spent online, by age	32
Figure 35. Trusted sources of information	33
Figure 36. Trustworthy sources of online media, by age	34
Figure 37. Types of information more often taken from online rather than offline sources	35

ACKNOWLEDGEMENTS

As an organisation committed to supporting the use of communications for social development in Afghanistan, it was a pleasure for MAGENTA to conduct this research on Afghan's media consumption preferences and habits. This data is critical to helping partners in Afghanistan understand how best to reach Afghans with critical information and social and behavioural change communication) SBCC (programming).

MAGENTA would like to express its appreciation and gratitude to the team responsible for the production of this report. This unique research was made possible with the financial resources and vision of UNDP LOTFA in Afghanistan. MAGENTA extends its appreciation to SP Knowledge for drafting this report; Saagarika Dadu for her support on developing the methodology and data collection tools; Mustafa al-Abdali for his work on designing the report; NOMA Consulting, which conducted the data collection for this research; and Sarah-Jean Cunningham, Elizabeth Robinson, and other MAGENTA staff for their support during the data collection and analysis process.

MAGENTA urges policymakers and donors to utilise this research to more effectively reach Afghans with information and support that can help them to lead better lives.

EXECUTIVE SUMMARY

Media use and penetration in Afghanistan has been steadily increasing since the fall of the Taliban in 2001. While this has been the case across all channels and in nearly all areas, there has been notably faster growth in urban areas. While most of the country (70%) remains rural, 93% of rural Afghans do have electricity¹, giving them some access to radio and TV. As the country continues to urbanise and develop economically and socially, trends in media consumption are changing. Use of radio as a source of information has declined over time as more and more people rely on TV for information instead—and, increasingly, the internet.

This study has found that 39% of Afghans have access to the internet, which is a notably higher figure than reported by several other recent studies. The Asia Foundation reported in 2019 that 17.6% of Afghans use the internet², and Hootsuite reported internet penetration at 20% in early 2020³. The difference between these figures and the one reported in this study is likely due to the phone polling method used: our sample likely excluded the most rural Afghans, who do not own a phone.

Alongside the internet, use of social media is also expanding. Our results show that nearly all Afghans who have access to the internet also use social media (35% of the total sample). By far, Facebook and Facebook Messenger are the most popular and most trusted social media sites.

Despite the rapid growth in access to the internet and online sources of information, Afghans still see their family and friends as highly trusted sources of information—extending to exchanges. Other trusted members of the community

include doctors and teachers, and respondents in the In-app polling survey were more likely to trust celebrities than the UN. While this may appear concerning for the UN, these findings point to several opportunities to use more-trusted figures in UN communications to increase credibility.”

Importantly—and uniquely—this survey also specifically sought to understand the media habits of people with disabilities. About one in five men and one in ten women in the In-app polling survey reported having a disability, and these respondents were less likely to use the internet as a main source of news and information than those without disabilities. As the type of disability may affect whether online information is easier or harder to access, this finding requires more investigation.

This research also aimed to better understand how Afghans access information about justice and security services. Most phone survey respondents—and in particular women, those in rural areas, those without formal education, the unemployed, and students—felt that existing information about justice services in their community was insufficient. Respondents more often wanted to know more about the procedures and rules of using justice services, as well as the address and contact details of relevant offices. This suggests that even the most basic information about justice and security services is lacking, especially for respondents who do not fully participate in society, such as women.” These gaps are important to note for future LOTFA programming and should be addressed as part of larger ongoing efforts to bolster the rule of law and trust in government throughout Afghanistan.

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1. Survey of the Afghan People, 2019. The Asia Foundation. December 2019. https://asiafoundation.org/wp-content/uploads/2019/12/2019_Afghan_Survey_Full-Report.pdf
 2. Ibid.
 3. Afghanistan Digital 2020. Hootsuite. <https://datareportal.com/reports/digital-2020-afghanistan>

INTRODUCTION

This research study was commissioned by UNDP Afghanistan's Law and Order Trust Fund for Afghanistan (LOTFA) unit to better understand the media consumption patterns and preferences of Afghan citizens. This data will be used to inform the design of social and behavioural change communications (SBCC) programming in the areas of security and access to justice. Given that channel selection—that is, how to best reach the target audience with messages—is critical to the design of SBCC programs, updated media consumption data is necessary to support effective SBCC interventions. While data on media consumption and preferences is available for Afghanistan, the existing information is outdated—especially given the

rapid expansion in access to information and media in the country—and often inconsistent. Therefore, UNDP sought recent and relevant data to support SBCC programme design within the context of LOTFA programming.

To this end, MAGENTA designed and conducted an audience research study on how people in Afghanistan access information, what sources or channels they find to be most credible, and how this media shapes their opinions and experience. The data was sourced from two surveys: 1) a nationwide survey examining the consumption habits of Afghans nationwide and 2) a smaller survey focused on individuals who have access to and use the internet.

METHODOLOGY

RESEARCH QUESTIONS

This research set out to answer the following questions:

- What are the overall trends in media preferences and consumption among the Afghan public?

- How does the Afghan public access information on justice and security-related services?

The following sections outline the approach to gathering this data, followed by the results.

DATA COLLECTION METHODS

MAGENTA conducted a national survey with 2,403 Afghans primarily based in five provinces (Kabul, Herat, Kandahar, Nangarhar, and Balkh⁴). The phone survey focused on media preferences, consumption, and access to information on justice and security related services. The survey was designed to reach Afghans nationwide, including those living in both urban and rural areas and those without access to smartphones or the internet. The phone survey took place from June 7th – July 16th, 2020.

A second survey collected data specifically from those who had access to and used the internet. The survey used the in-app polling tool to assess overall trends in digital media preferences and consumption among 809

Afghans with access to the internet. In-app polling replaced banner ads with the survey in smartphone apps in order to engage respondents. Upon clicking on the survey link, the respondents saw a full-screen survey with 20 questions regarding access to information on justice and security related services. The in-app polling took place from June 17th – June 24th, 2020.

Data obtained from the survey was considered particularly important as it aimed to provide insight into the a portion of the Afghan population that not only had greater access to the internet, but also represents those who were more educated, and potentially had greater access to information about justice and security related services.

REPORTING

Data from each survey was analysed and reported separately. The surveys had different aims, sampling approaches and questionnaire designs, therefore the data sets cannot be directly compared.

All results reported were found to be significant,⁵ unless reported otherwise. Percentages are reported as a proportion of the total sample unless otherwise stated. In these cases, the response numbers (also known as 'base size') are reported alongside the percentage.

SAMPLE

Part I: Nationwide Telephone Survey

The phone survey's 2,403 respondents were evenly divided between men and women and evenly distributed by age (Figure 1).

4. 3% of respondents were based in other provinces.

5. Significance for both surveys tested using the Z-test of proportions.

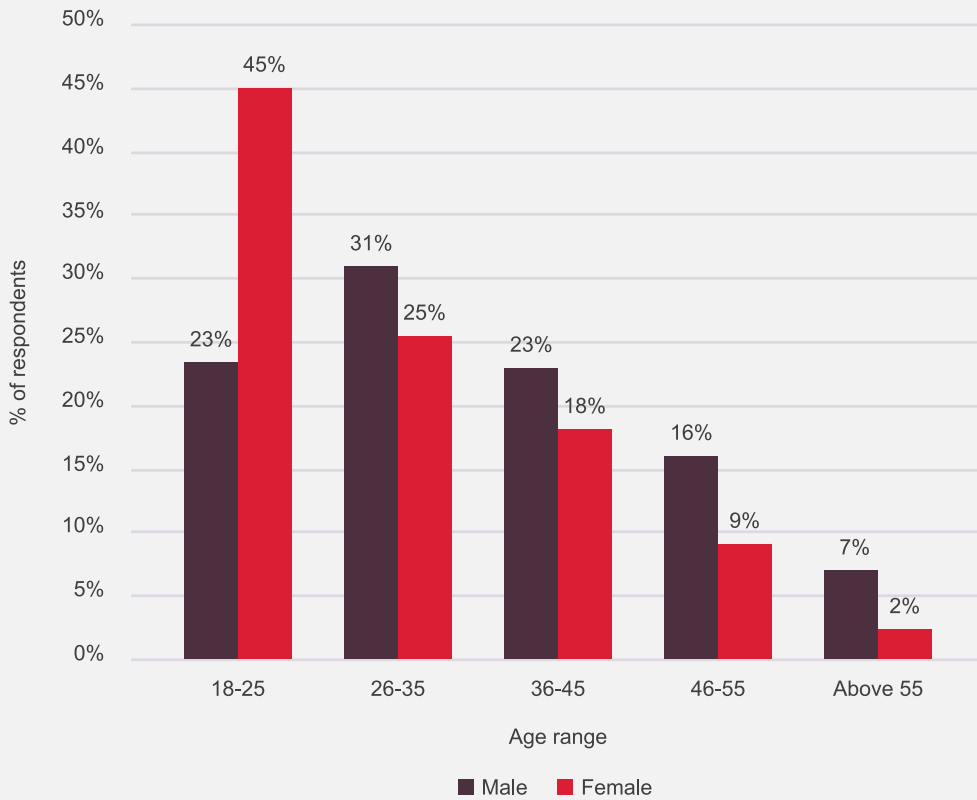


Figure 1. Age and gender

- 18-25 year-olds made up the largest group (34% or 812 out of 2,403) followed by those aged 26-35 years (28%), 36-45 years (21%) and 46-55 years (12%). Only 5% were 55 or above.
- 52% of respondents were male; 48% were female.
- The youngest age group (18-25s) was mostly female. All other age groups were primarily male.

As per the sampling plan, the sample was primarily rural (Figure 2).

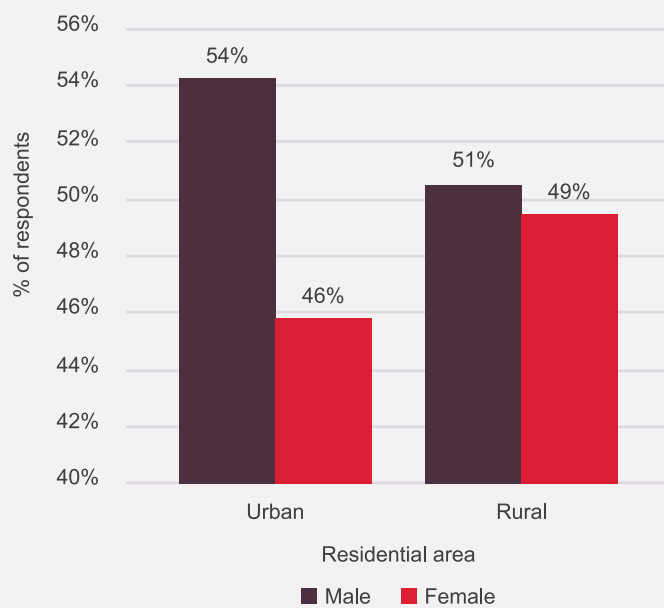


Figure 2. Residential area and gender

- Sixty-seven percent of respondents lived in rural areas, whereas 33% lived in urban areas.
- Out of the total sample of 2,403 respondents, 20% lived in Nangarhar, 19% in Kabul, 19% in Herat, 19% in Kandahar, and 19% in Balkh and 3% in other provinces.
- The remaining 3% chose 'other' as their province.
- Despite the fact that the majority of respondents lived in rural areas, most respondents (89%) had electricity in their homes.

Around half of respondents identified as Pashtun (52%) (Figure 3).

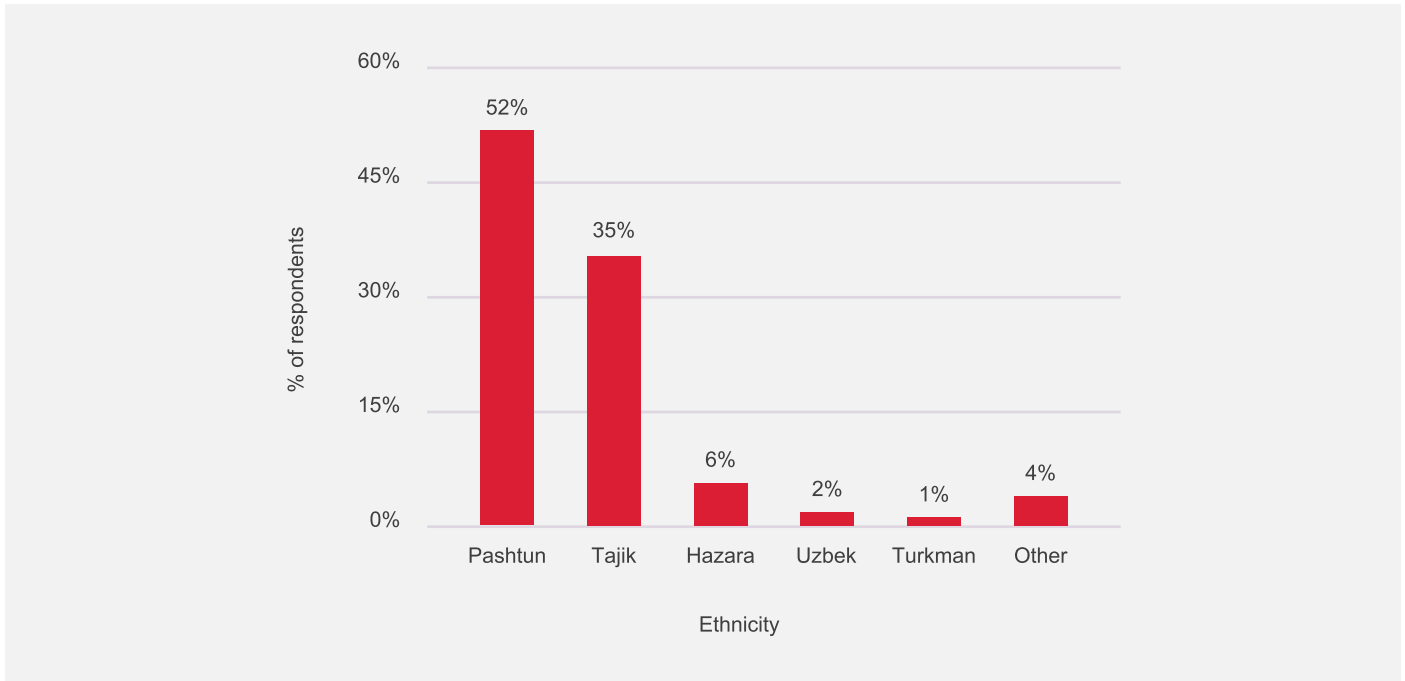


Figure 3. Ethnicity

- Tajiks (35%), Hazara (6%), Uzbek (2%) and Turkman (1%) comprised most of the rest of the sample.
- The 'Other' category included respondents from a further 17 ethnicities.
- Consistent with the national average (60% of the country), 57% of the respondents spoke Dari, while 52% spoke Pashto. Of the remaining, 2% spoke Uzbek, 1% spoke Turkmen and 2% selected another language.

A little more than half (56%) of respondents were able to read and write. (Figure 4).

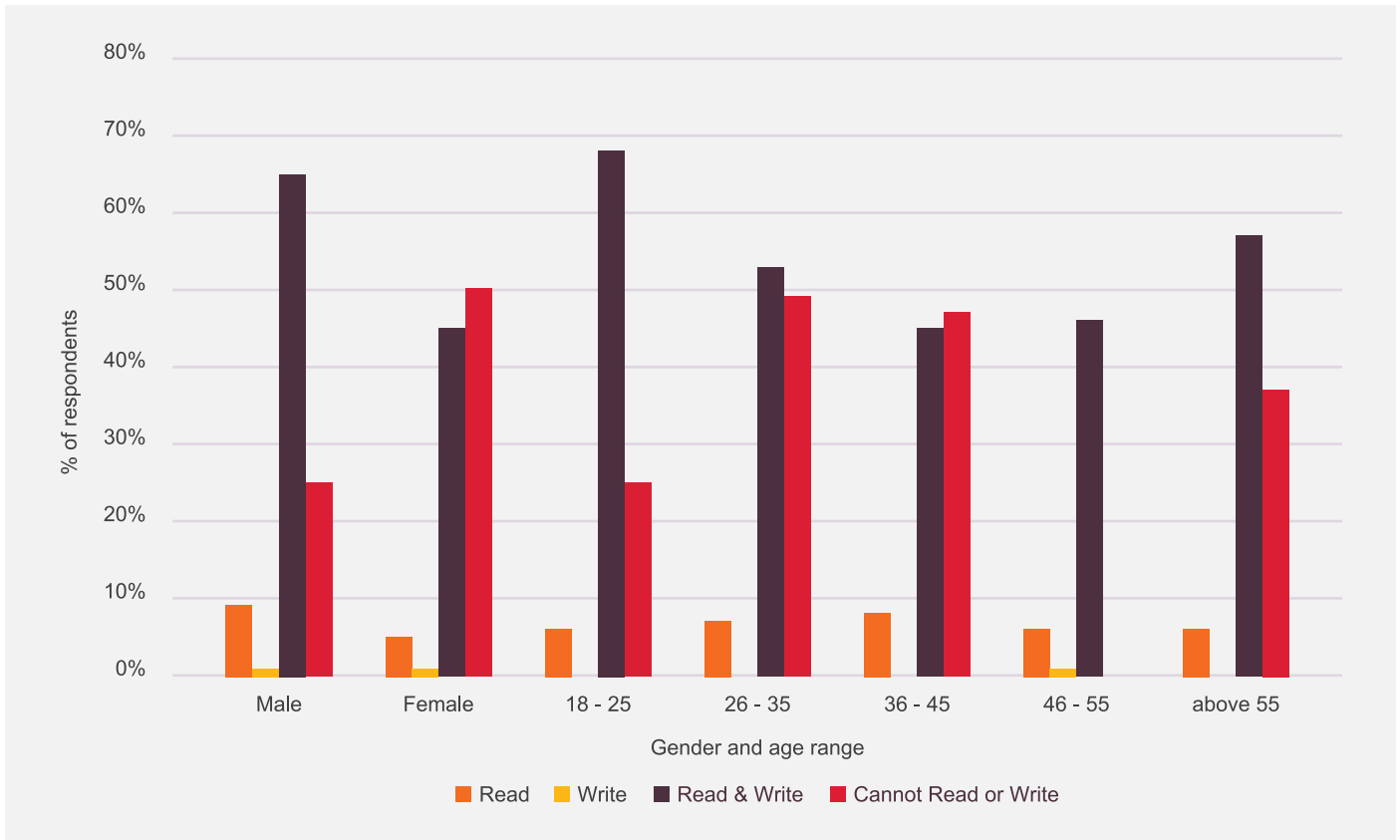


Figure 4. Literacy, age and gender

- Seven percent said they could read only, a small handful said they could write only, and the remaining 37% respondents reported to not being able to either read or write.
- Younger respondents were more likely to say they could read.
- Respondents 18-25 years old were most likely to say they could read (68% or 552 of 812)
- 53% (360 of 684) of 26-35-year olds said they could.
- Male respondents (65% or 812 of 1,244) were more likely to be literate when compared with female respondents (45% or 525 of 1,159), despite male respondents on average being older than female respondents.

About 61% of the sample had completed some level of formal education.⁶

- Forty percent of respondents received no education, rising to 50% in 36-55-year olds (Figure 5).
- The highest proportion of graduates was in the 18-35 years of age category.

6. Respondents were not asked to report non-formal or informal education experience.

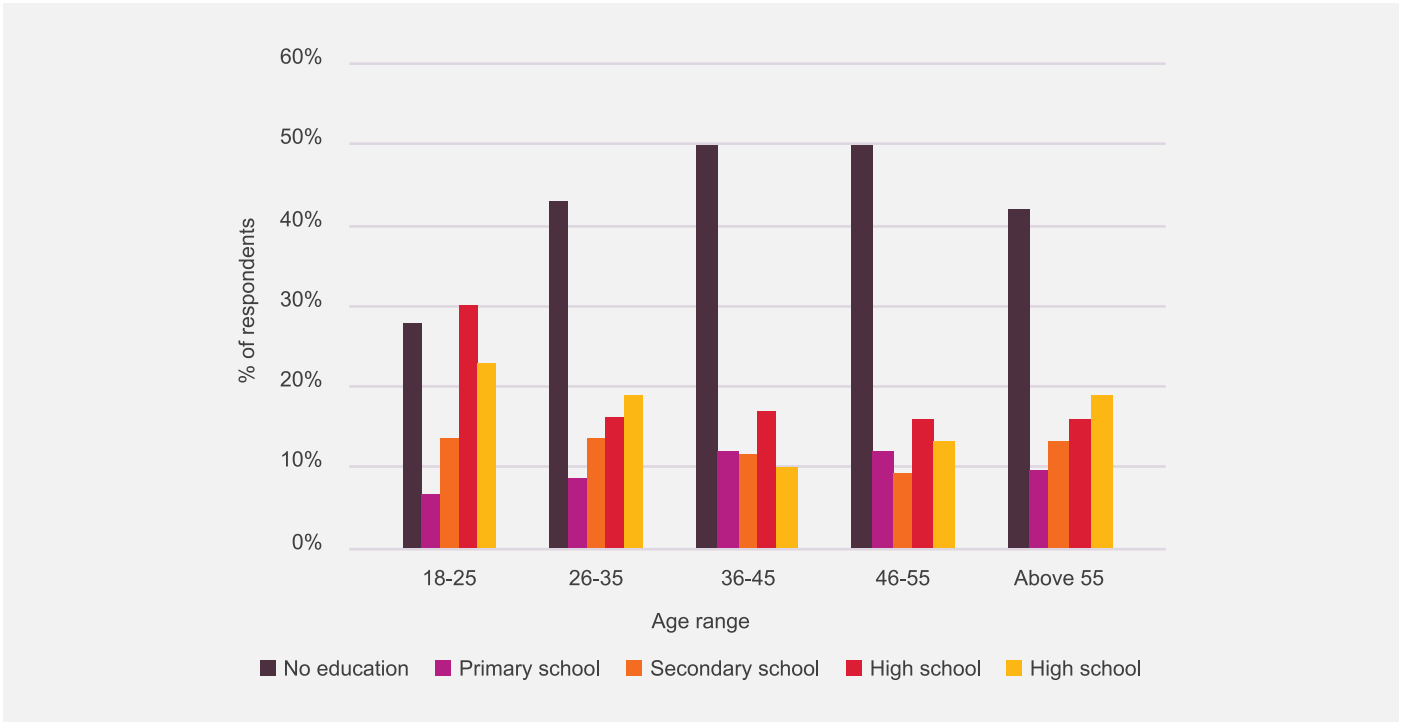


Figure 5. Education by age⁷

Nearly half (47%) of respondents were unemployed. (Figure 6).

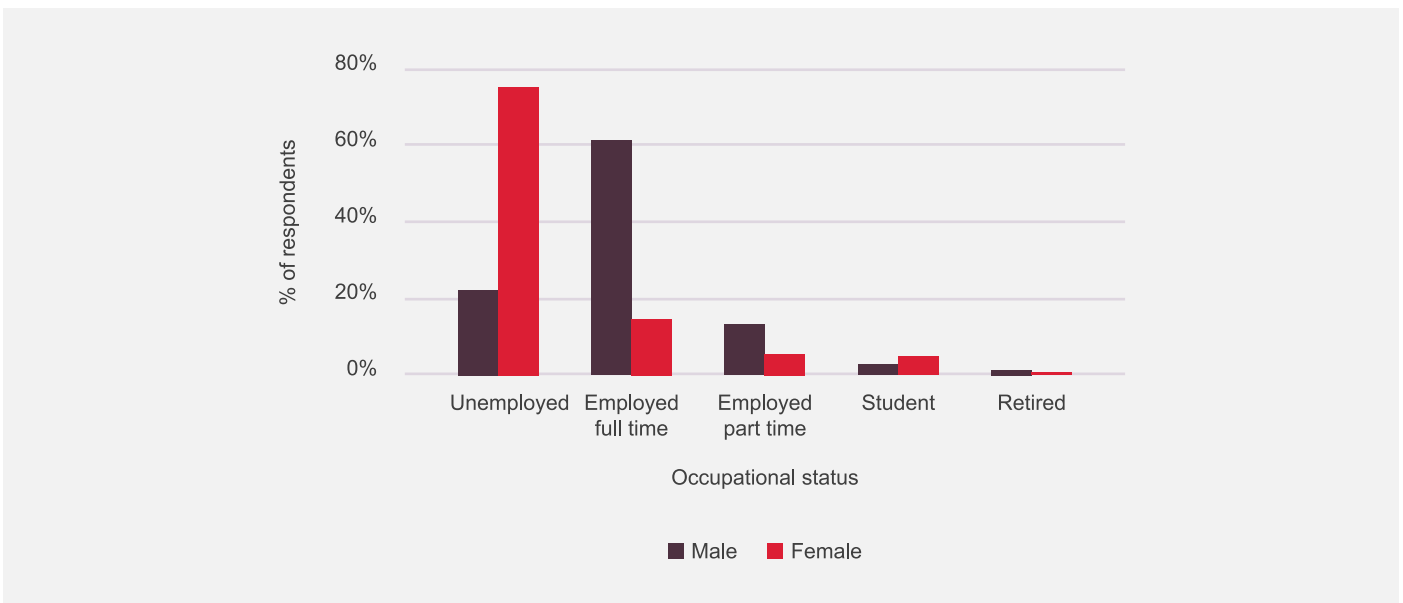


Figure 6. Occupation status by gender

- The other half include 38% who were employed full-time, (54% or 442 of 812) and most likely to be students (11%).
- 9% who were employed part-time,
- 4% who were students
- 1% who were retired.
- Respondents aged 18-25 years, as well as being the most educated, were also most likely to be unemployed
- Respondents between the ages of 26-35 years (46% or 313 of 684) and 36-45 years (46% or 229 of 494) were more likely to be employed full-time.
- Female respondents were more likely than male respondents to be uneducated (75% or 864 1159) and unemployed. “Unemployed” also covers the housewife category, in part explaining the high level of

7. Secondary school is grades 7 – 9 and high school is grades 10 – 12.

unemployment among female respondents (Figure 5).

Part II: In-App Polling

Most of the 809 respondents in the in-app polling were young and male (Figure 7). In particular:

- Most respondents were young: 73% were 18-25 years old; 18% were 26-35 years old.
- Most respondents were male (80%); 20% were female.
- Respondents aged 18 to 25 and above 50 were more likely to be female.
- All respondents aged 36 to 49 were male (31).
- Female respondents were younger than male respondents; 84% of the 158 female respondents were 18-25 compared to 70% of 454 male respondents.

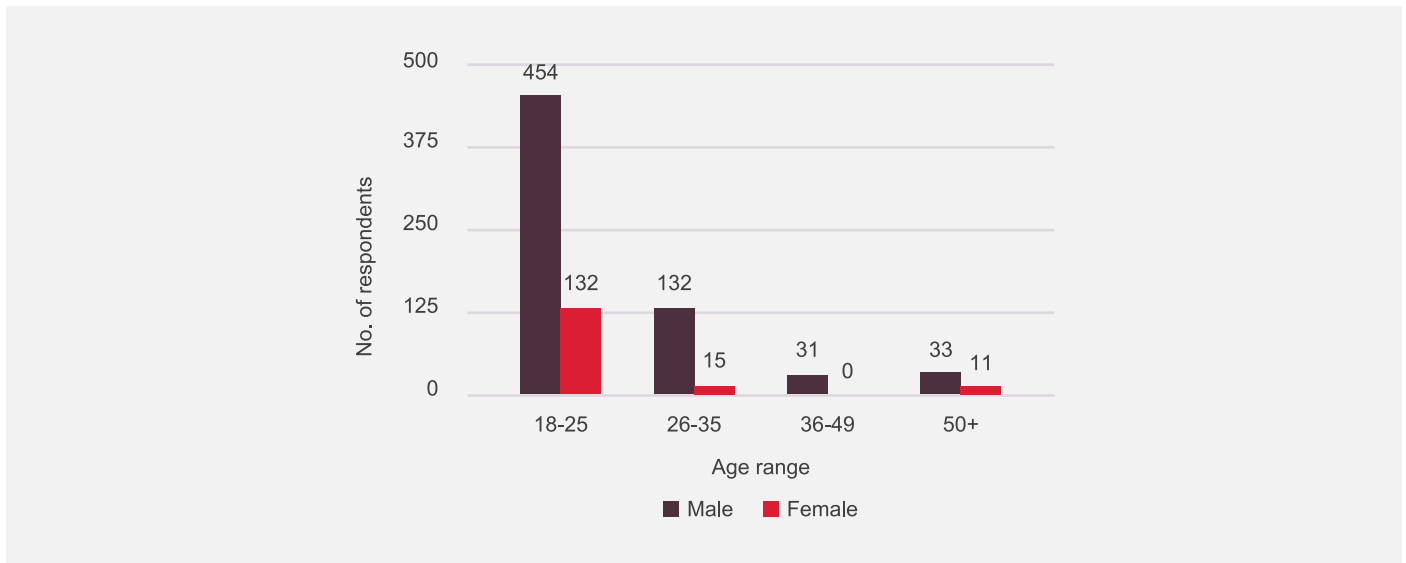


Figure 7. Age and gender

Most respondents were in **Kabul (59%), Balkh (12%), Herat (10%) or Kandahar (9%)** when they took the survey. The remaining 10% were located across an additional 19 provinces.

Respondents 'home province was usually **Kabul (28%)**, followed by **Balkh (10%), Herat (10%), Nangahar (9%)** and

Kandahar (6%).

Almost one in five (19%) male respondents reported having a disability. Fewer women (9% or 14 of 158 women) of the female respondents reported some sort of disability. Most of respondents did not report having any disability (83%).⁸

CHALLENGES AND DATA LIMITATIONS

Challenges and data limitations pertaining to the telephone survey:

- In general, respondents expressed discomfort when they were told that the survey would include questions about police and courts (it was also mentioned that the survey would include questions about media use more generally, but those questions were less sensitive). Some respondents were not comfortable giving their names; women asked the enumerators how their number had been obtained (respondents were selected randomly, from a list of computer-generated numbers), and some did not consent to taking the survey. Some
- respondents also stopped the survey when they reached the questions about police.
- A minority of respondents had patterns of media use that could not be captured by the answer options in the survey. For example, in at least one case, a respondent had previously been in the habit of watching TV but stopped doing so after returning from the Hajj (due to a new sense of religious duty). It should be noted that these cases were exceptions, and in general the survey accurately captured the experiences of respondents.
- Some respondents had trouble selecting a specific time

8. Due to a limit on the number of questions in the in-app polling, more detailed demographic questions could not be included in the survey.

of day when they watched TV, for example, as they watched randomly, instead of at specific times.

- As one survey was conducted over the phone and one survey was conducted via smartphones, the research largely excluded respondents who did not own any type of phone. However, some respondents—often women—reported that they did not own a phone and explained that they were using a family member’s phone to take the survey.
- Respondents at times provided conflicting information, especially about the ANP and trusted sources of information. This may be linked to respondents’ concerns

about the questions that mentioned police.

- Respondents in rural areas often did not know the difference between the ANP and other security officials, such as the ANA or bodyguards. Enumerators explained the difference to respondents to the degree possible.

Data limitations of the in-app polling:

- Given that the in-app polling can only be accessed using a smartphone, by default all respondents who participated in the in-app polling owned a smartphone, and therefore were likely more educated and more urban than the general Afghan population.

PART I: NATIONAL MEDIA CONSUMPTION HABITS

GENERAL MEDIA CONSUMPTION

Section I: Consumption of Media Sources

Respondents most often reported TV (76%) as the media source they consumed most regularly. Radio (63%) and internet (37%) followed. While TV was the most regularly consumed across age groups, younger respondents (45% of 18- 25-year olds and 41% of 26-35-year olds) were more likely to use the internet than older respondents.

Both male and female respondents regularly consumed TV media and did so at roughly equal rates. However, men were more likely to consume a broad range of media,

69% saying they regularly listened to the radio (women 57%), 49% internet (women 24%) and 36% billboards (women 26%) and 14% newspaper and magazines (women 7%). (Figure 8).

Respondents living in urban and rural areas were both most likely to say they regularly consumed TV. Urban respondents watched TV at slightly higher rates (86%) than rural (72%). Conversely, 66% of rural respondents listened to the radio compared to 57% of urban.

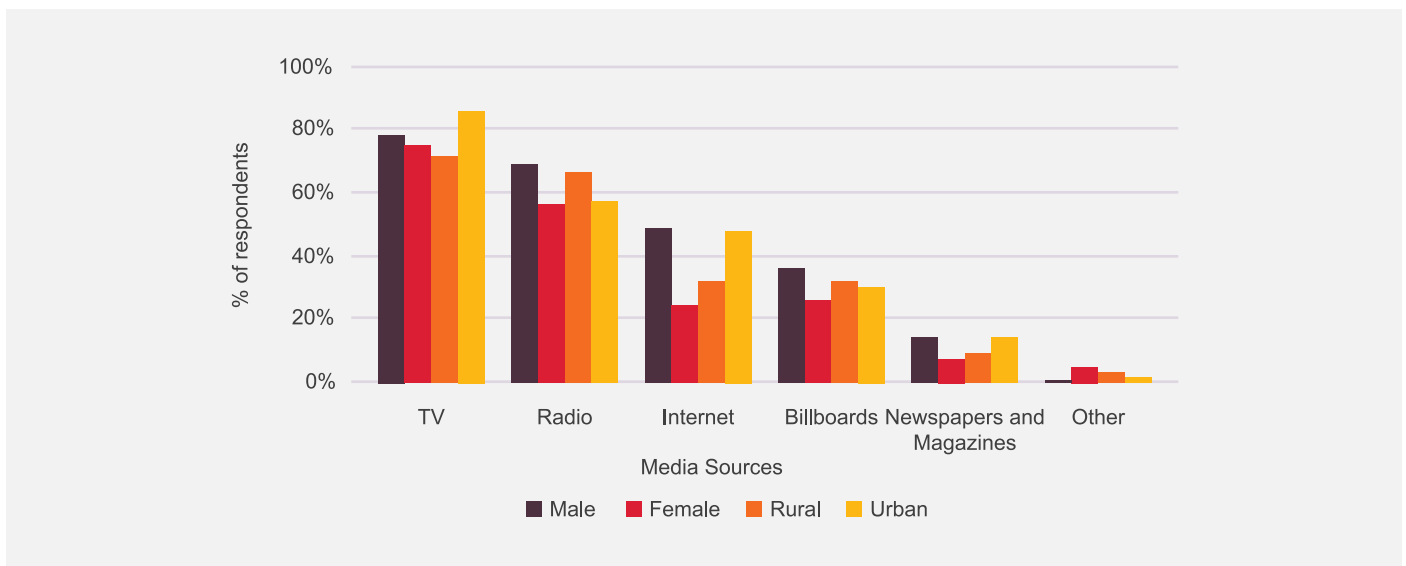


Figure 8. Frequency of use of media sources by gender and location

With regards to educational attainment, respondents who reported having gone to primary school, secondary school, high school or university were more likely than those with lower or no education to watch TV, use the internet, see billboards, and read newspapers and magazines than

those with lower level of education. Interestingly, university students were the least likely to use the radio. Students were also more likely to use the TV, internet and read newspapers and magazines when compared with those with other categories of occupation.

TV viewership and ownership

Most respondents (79%) claimed to watch TV regularly. Of these, male respondents were more likely to watch TV (81%) than female (77%).

A slightly lower proportion (72%) reported that there was a TV in the house, with the implication that at least

7% watched TV outside of their home. Afghans appear more likely to own a TV if they:

- Live in an urban are (84%), though note that the majority of rurally resident Afghans now have a TV in the house (67%).

- If they have a high school (82%) or university education (92%) compared to 70% of the population who had left primary school and a slimmer majority of 58% who reported no education.

watching TV (Figure 9). While men were more likely to watch more TV overall, women who watched TV did so for longer, 27% watching for over five hours per day compared to 13% of men (Figure 10).

There were no significant differences the rates of men (73%) and women (72%) who had a TV in the house.

Early evening is prime TV time. Around half of the sample watched TV between 6:00 PM and 9:00 PM (56%) (Figure 11). Men were much more likely to watch TV during night-time hours, and women during daytime hours.

Respondents typically spent 1-4 hours per day

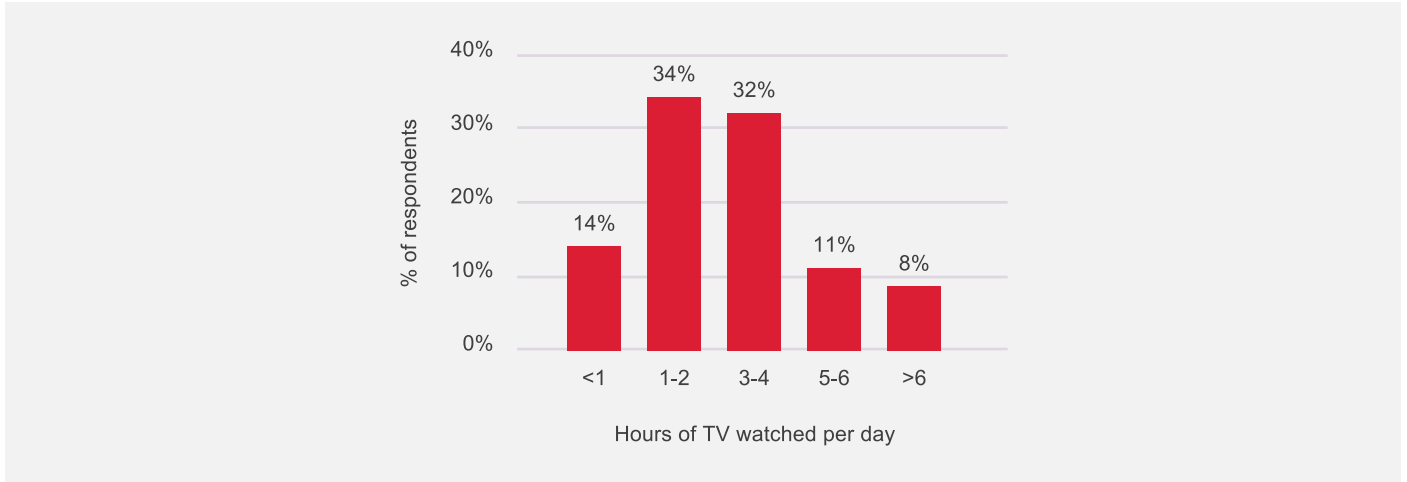


Figure 9. Hours of TV watched per day

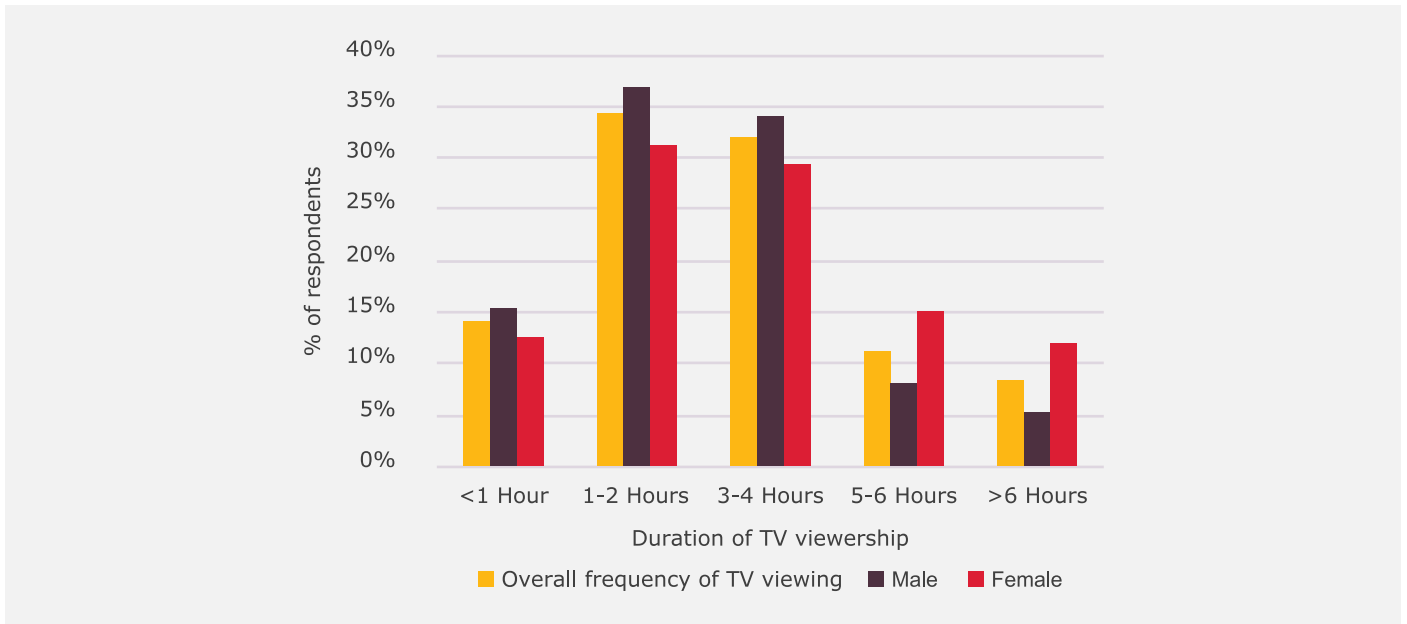


Figure 10. Duration of TV viewership and gender

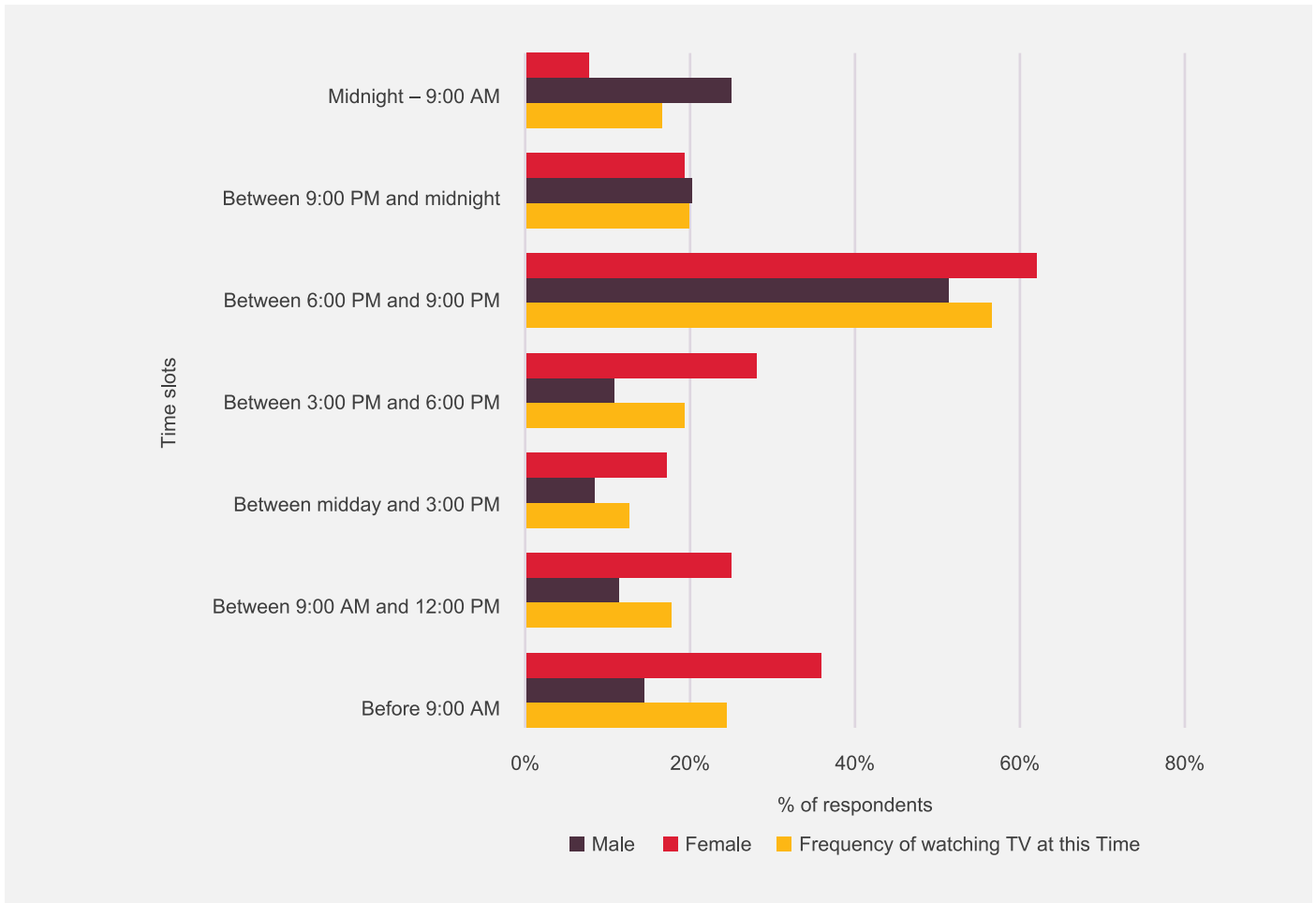


Figure 11. Time of day TV watched

Radio Usage

Most (61%) said they listened to the radio, even though only 44% had one in the house. Men were more likely than women to both listen to the radio (68% versus 53% of women) and have one in the home (49% versus 40% of women). Education was a lesser divider for radio listenership than television, university-educated respondents being the only group significantly less likely to say they listened to the radio (52%) than others, for example 64% in high school.

The use of mobile phones to tune into radio stations appears to explain this discrepancy. While most respondents listened to the radio using a radio set (51% of 1462), over half used something else: their phone (50%) or their car radio (12%) being most frequent. Respondents who owned radios lived in rural areas (47%).

Respondents aged 18 to 55 were more likely to listen to the radio on their phone when compared to those who were

above 55 years old. Furthermore, women were more likely to use a radio set (60% of 618) or use someone else's phone (4%) of 618 when compared to males who were more likely to listen to the radio on their own phone (56%) of 844 or on a car radio (21%) of 844.

Most listened less than two hours per day, usually in the mornings with another spike in early evening. 39% of respondents spent 1-2 hours listening to the radio per day, 23% less than one hour, 3-4 26% hours and just 13% more than 5 hours. There were no significant gender differences in hours spent listening to the radio.

As shown in Figure 12, 46% of respondents listened to the radio before 9:00 AM, 36% listened to the radio between 9:00 AM and 12:00 PM. There was another spike in listenership between 6pm and 9pm (28%).

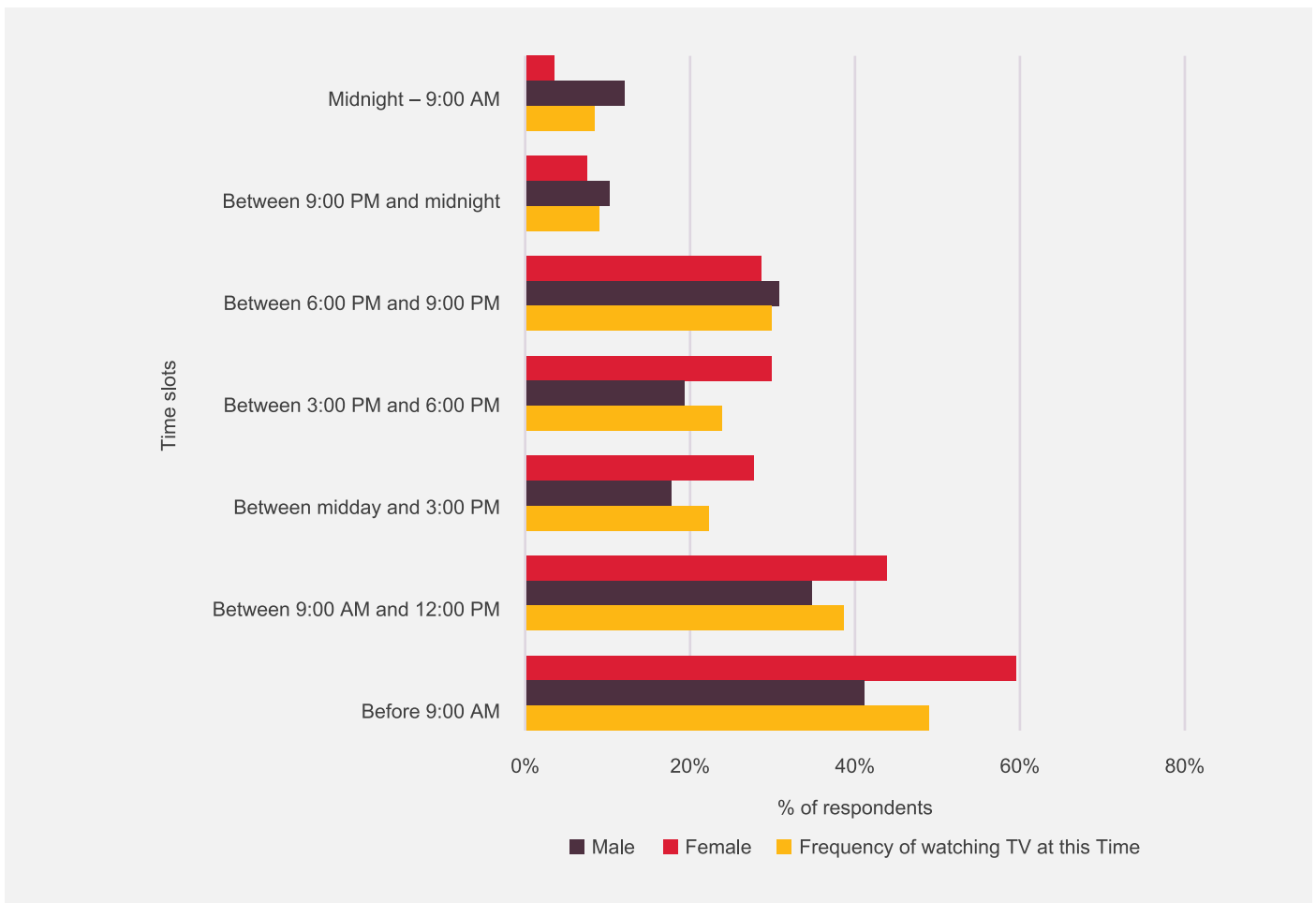


Figure 12. Time of day for radio listenership

Internet Usage

Most Afghans still appear not to use the internet (61%) but those who do, access it frequently (83% multiple times per day). Several other recent studies present lower estimates for internet penetration in Afghanistan than the 39% reported here: The Asia Foundation reported in 2019 that 17.6% of Afghans use the internet,⁹ and Hootsuite reported internet penetration at 20% in early 2020.¹⁰ The difference between these figures and the one reported in this study is likely due to sampling: our sample excluded

the most rural Afghans who do not own a phone.

Older, female and rural respondents were the least likely to use the internet. 74% of the survey’s 300 respondents aged 46-55, 85% of over 55s, 76% of female respondents 68% of respondents living in rural areas (68%) reported never using the internet. Yet even in Kabul, more than half (56%) of respondents never used the internet, rising to 70% of respondents living in Nangahar and Kandahar.

Section II: Reasons for Using Media Sources

The phone survey looked at why the sample used TV, radio, and internet and social media.

News is the most common reasons for watching TV, closely followed by entertainment (Figure 13): of the 1,900 respondents who claimed to regularly watch TV, 93% watched TV to hear about news, 75% for fun and watching shows and movies, 12% to hear public announcements, 10% to have political discussion, and 4% for background

noise.¹¹

Female respondents were most likely to watch TV for the news too, though hardly ever for political discussion. They were also more likely, when compared to men, to watch TV for entertainment purposes. Respondents between the ages of 18 to 45 years were most likely to watch TV for entertainment purposes as compared to those who were aged 46 years and above.

9. Survey of the Afghan People 2019, The Asia Foundation. December 2019. https://asiafoundation.org/wp-content/uploads/2019/12/2019_Afghan_Survey_Full-Report.pdf

10. Afghanistan Digital 2020. Hootsuite. <https://datareportal.com/reports/digital-2020-afghanistan>

11. The remaining 3% claimed to watch TV for other reasons.

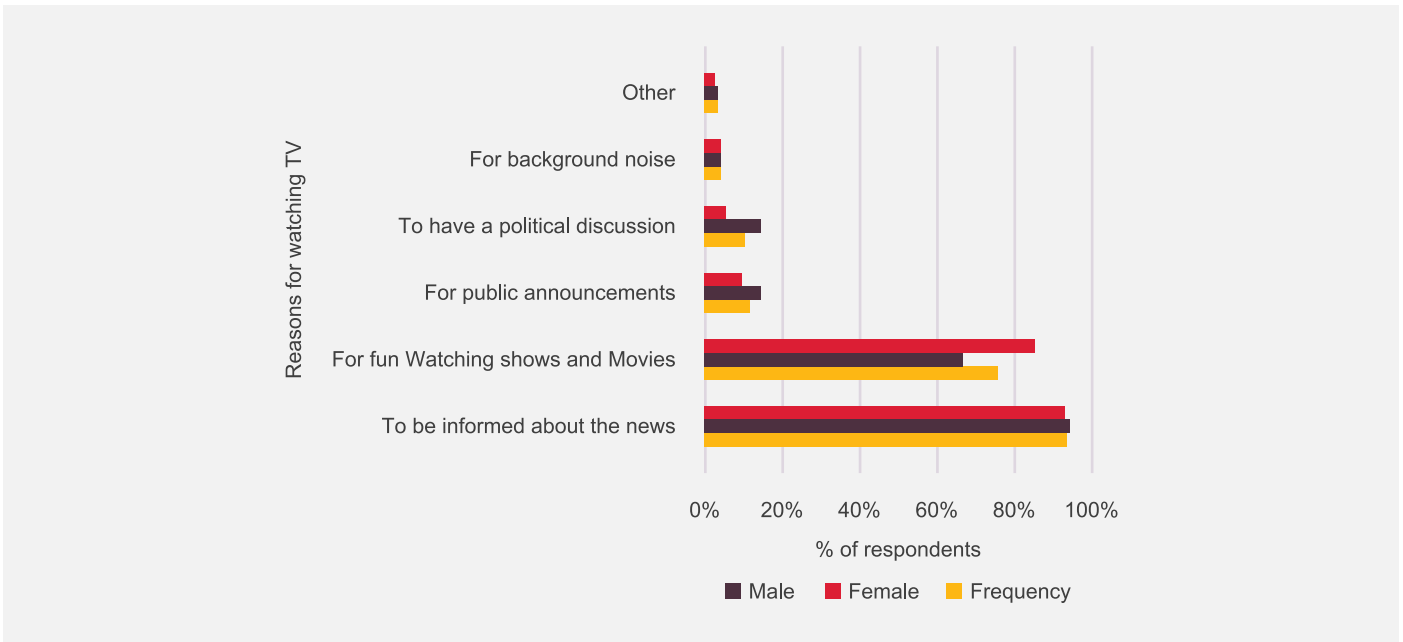


Figure 13. Reasons for watching TV

News is the most common reason for listening to the radio (Figure 14): of the 1,462 participants who regularly listened to the radio, 87% claimed to listen to it to hear about news, 58% listened to it for entertainment purposes (shows and radio dramas), 13% listened to the radio as

background noise, 10% listened to the radio for public announcements, and 7% listened to the radio to be able to have political discussion. The remaining 5% claimed to listen to the radio for other purposes.

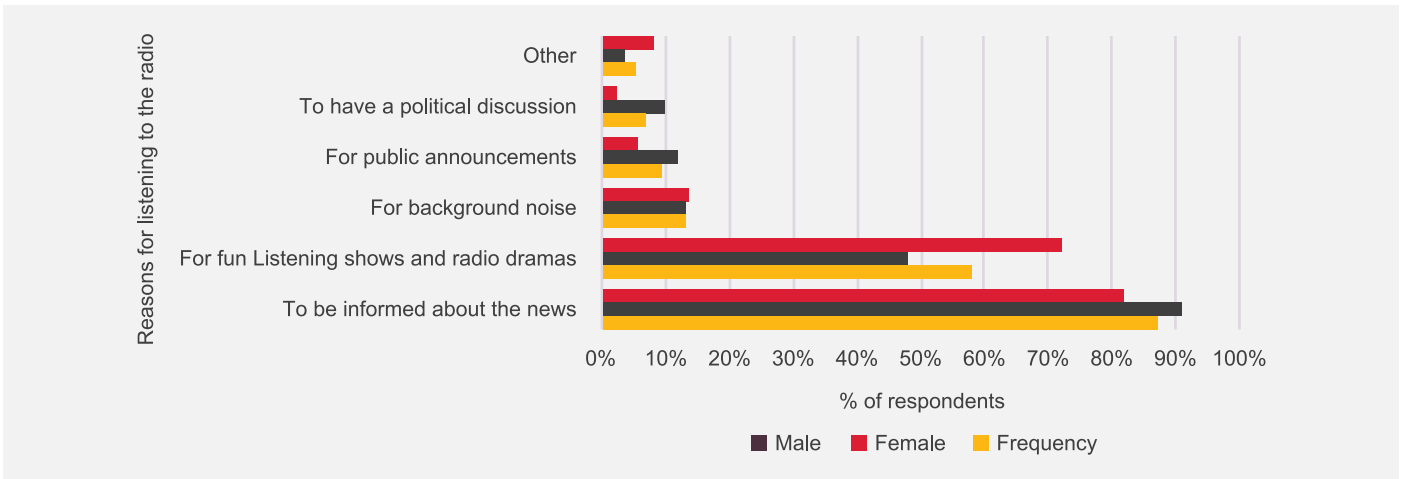


Figure 14. Reasons for listening to the radio

Compared to the use of TV, respondents between the ages of 18-25 years and 26-35 years were more likely to listen to the radio for entertainment purposes or as background noise. Female respondents were more likely than male respondents to listen to the radio for its entertainment value. Male respondents, on the other hand, claimed to use the radio more to get news, listen to public announcements and political discussions. Some respondents also reported that they were listening to educational content on the radio, as these shows have become more common during COVID-19, and because TV stations are producing fewer new shows.

Respondents usually accessed the internet via social media platforms (91%). This was followed by news (54%)

and entertainment (29%) platforms. A fifth (21%) used it for emailing, and 5% used it for gaming.

Communicating with friends and family, followed by reading or watching the news, is the most commonly-cited motive for accessing the internet. Of the 934 respondents who used the internet regularly, 87% used it to communicate with friends and family (Figure 15), 76% used it to get news, 34% used it for entertainment (watching shows and movies), 12% used it for work, 10% used it for public announcements, 7% used it to have political discussions, and 1% used it for background noise. The remaining 2% used the internet for other purposes.

Participants between the ages of 18-25 years and 26-35

years were more likely to use the internet for entertainment (41% and 34%), work (both 12%) or to listen to public announcements (9% and 12%), when compared with those who were 46 years and above. Moreover, internet and social media use in rural areas more heavily concentrated on family and friends (90%) than in urban areas (84%).

Of the 848 respondents (35%) who used social media regularly, Facebook (87%) and Facebook Messenger (73%) dominated, followed by the next most common Whatsapp (66%). Figure 15 shows the wide array of additional channels including 25% in other category, which may include social features on online games.

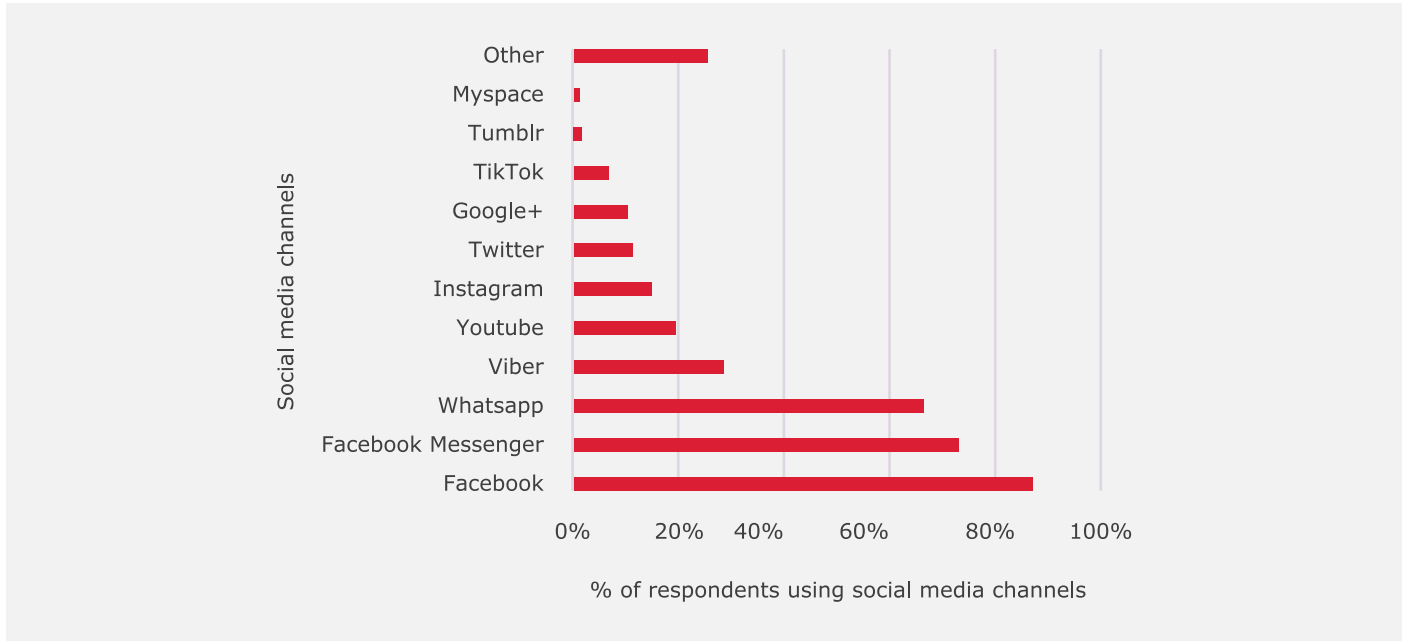


Figure 15. Social media channels consumption

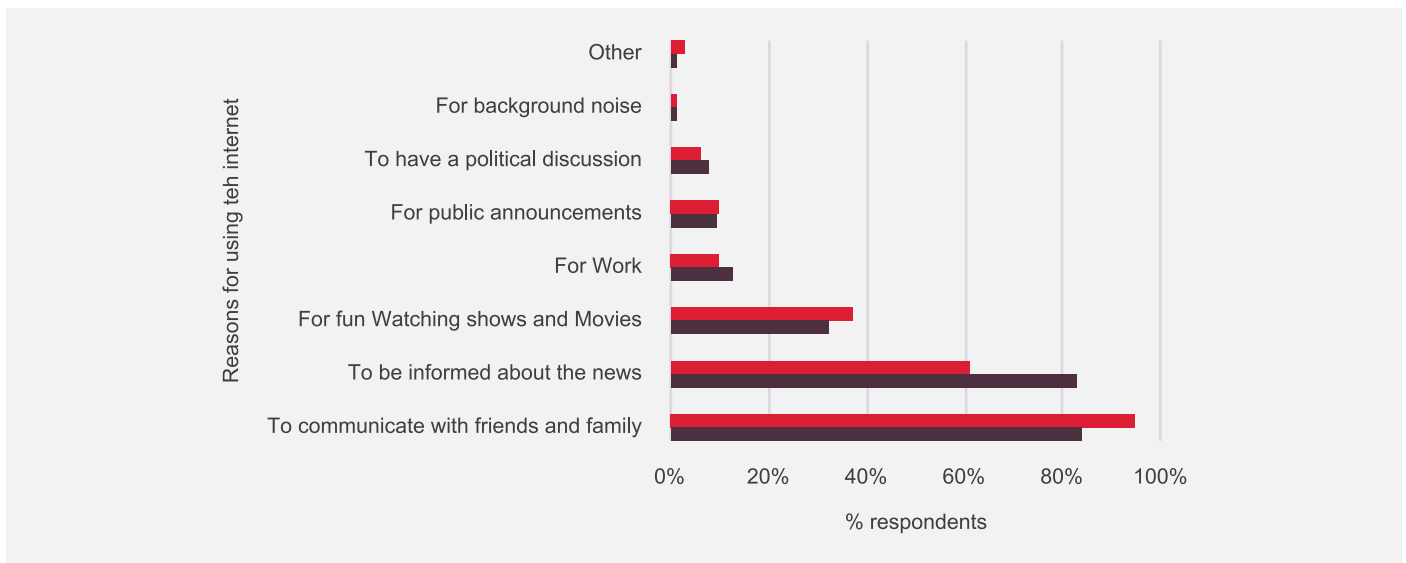


Figure 16. Reasons for accessing the internet

Section III: Preference of Media Sources

Tolo TV was by far the most popular TV channel: Of the 1,900 respondents who reported watching TV regularly, 70% watched Tolo TV. Next most popular were Shamshad (38%), Lemar and Ariana (35%) and Tolo News and Khurshid (15%). International channels were much less

watched. Nevertheless, the most popular international channels were the BBC (5%), Iranian TV (3%) and VOA (2%). A sizeable proportion (26%) reported watching ‘other’ channels (Figure 16).

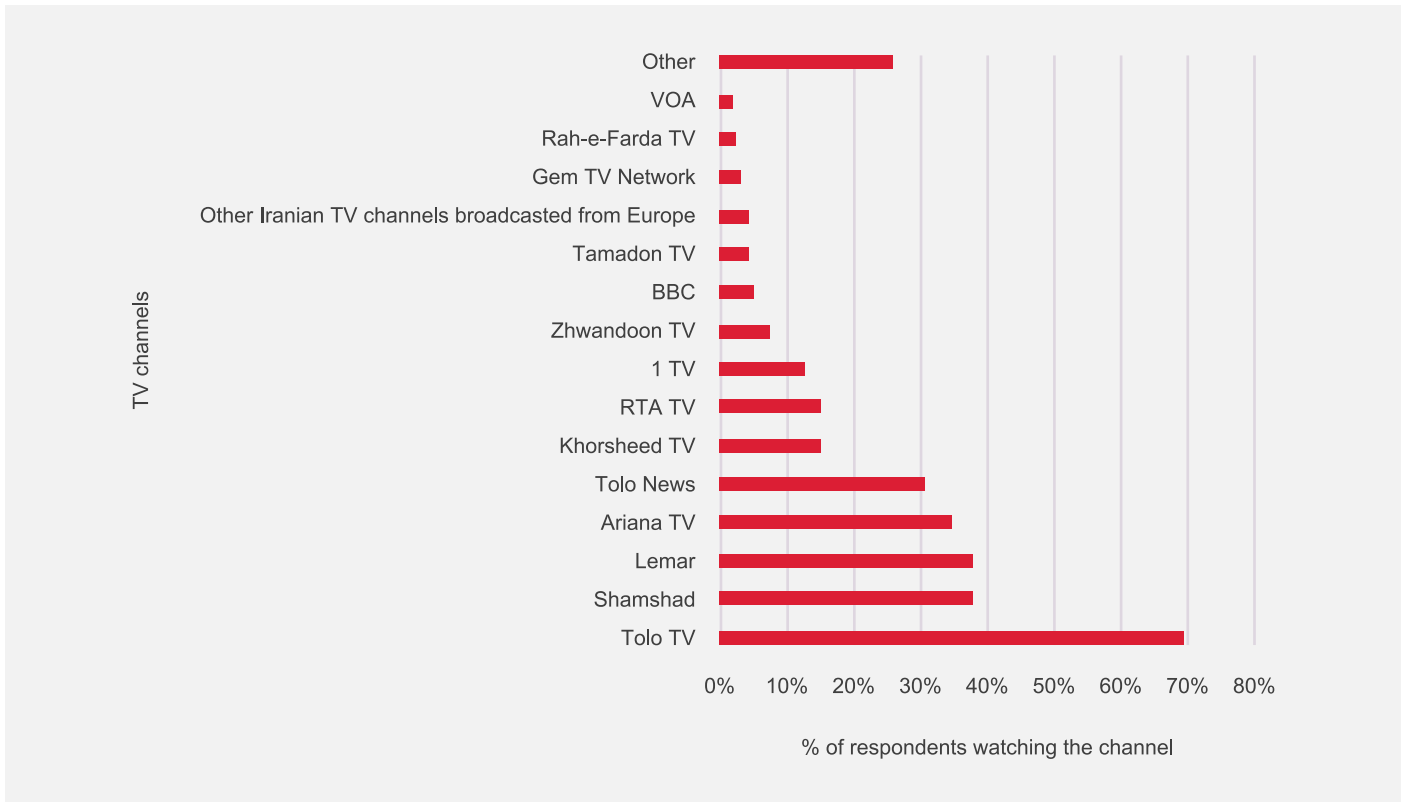


Figure 17. TV channels consumption

Azadi, Arman and BBC Pashto/ Persian were the most popular radio stations (Figure 18). Of the 1,462 who reported regularly listening to radio channels, 39% listened to Azadi Radio. This was followed by the radio stations Arman (37%), BBC Persian/Pashto (36%), Shamsad Radio (27%), Arakozia (19%), VOA Radio (10%), Ariana

FM (8%), Qur'an Radio (7%), Radio Bayan (6%), Salaam Watandar (6%), Sada-e Mardom (5%), Khurshid FM (3%), and Jawanan FM (3%). Again, the range of stations was broad, with over a third (36%) listening to 'other' radio stations (Figure 17).

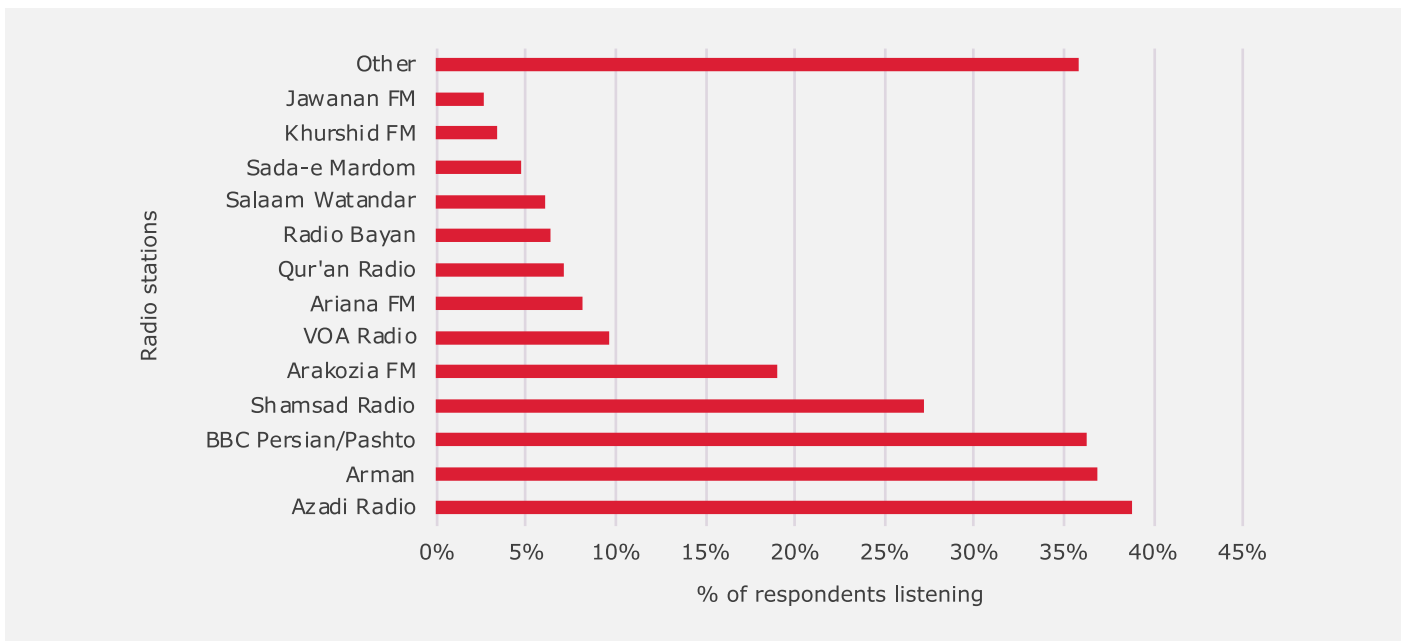


Figure 18. Radio channel consumption

Although the phone survey did not include a specific question concerning ways in which respondents prefer to gain information and news, 93% of respondents claimed to watch TV for this reason, 87% of respondents claimed

to listen to the radio for this reason, 76% (714/934) of respondents claimed to use the internet for this reason and 56% (471/848) of respondents using social media claimed to use it for this reason.

Section IV: Trust in Information Sources

Overall, the survey shows that family members (except in-laws) were the most trusted source of information for both male and female participants, offline and online. Beyond family, respondents were most confident

in teachers 'credibility 98% ,saying they trusted teachers compared to 94% trusting doctors ,the next most trustworthy category) Figure19).

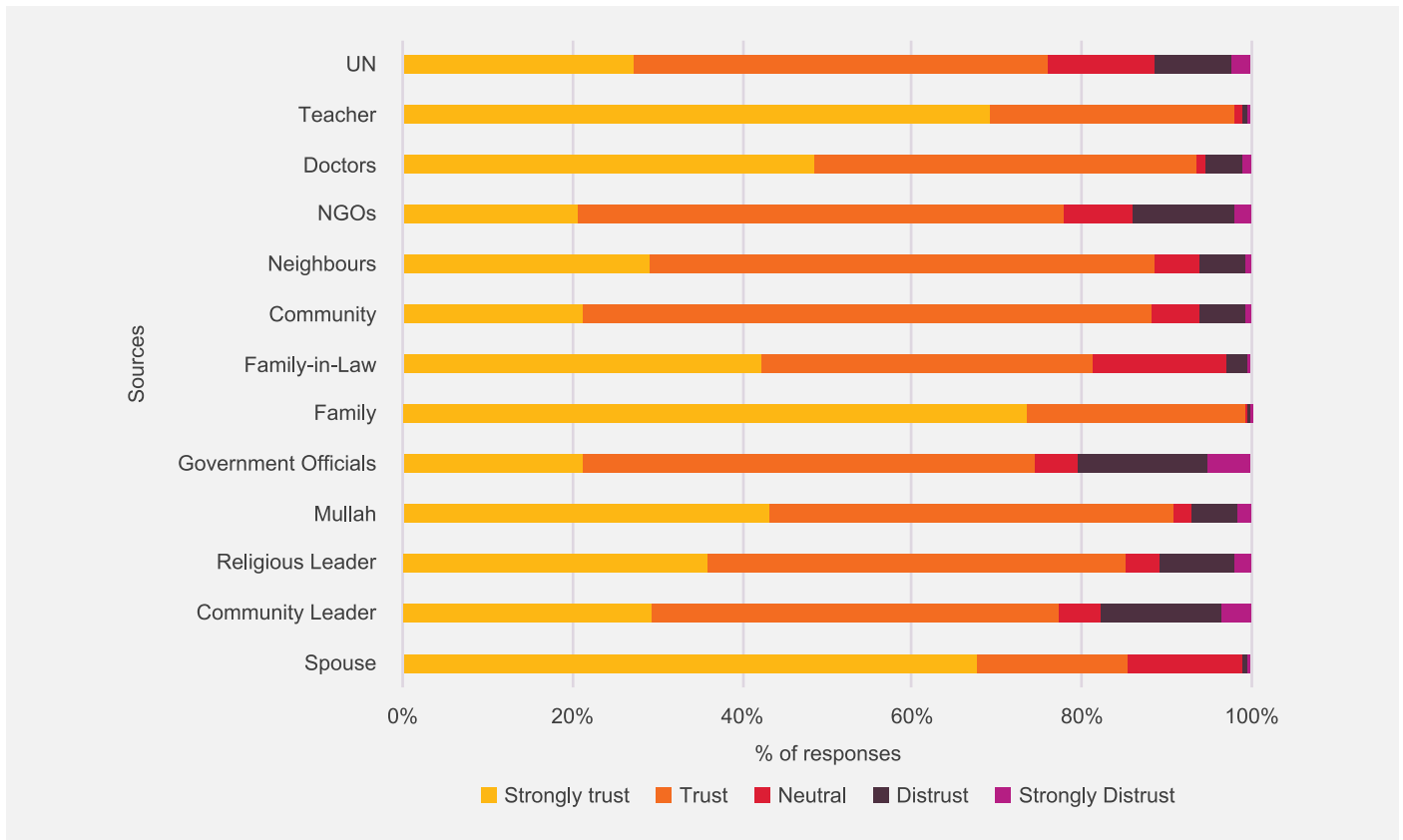


Figure 19. Trusted sources of information

Younger respondents most frequently said they trusted religious leaders. 89% of 18-25 year-olds said they trusted religious leaders in general (with 10% actively distrusting) and 91% said they trusted the mullah specifically. Over 55s were slightly less likely to trust religious leaders (81%, with 14% actively distrusting them).

Young respondents were also more likely than the average respondent to tell interviewers that they trusted community leaders, government officials and the UN (Figure 21). On the other hand, respondents aged above 55 were more likely to trust humanitarian NGOs (29%) than younger respondents (Figure 20).

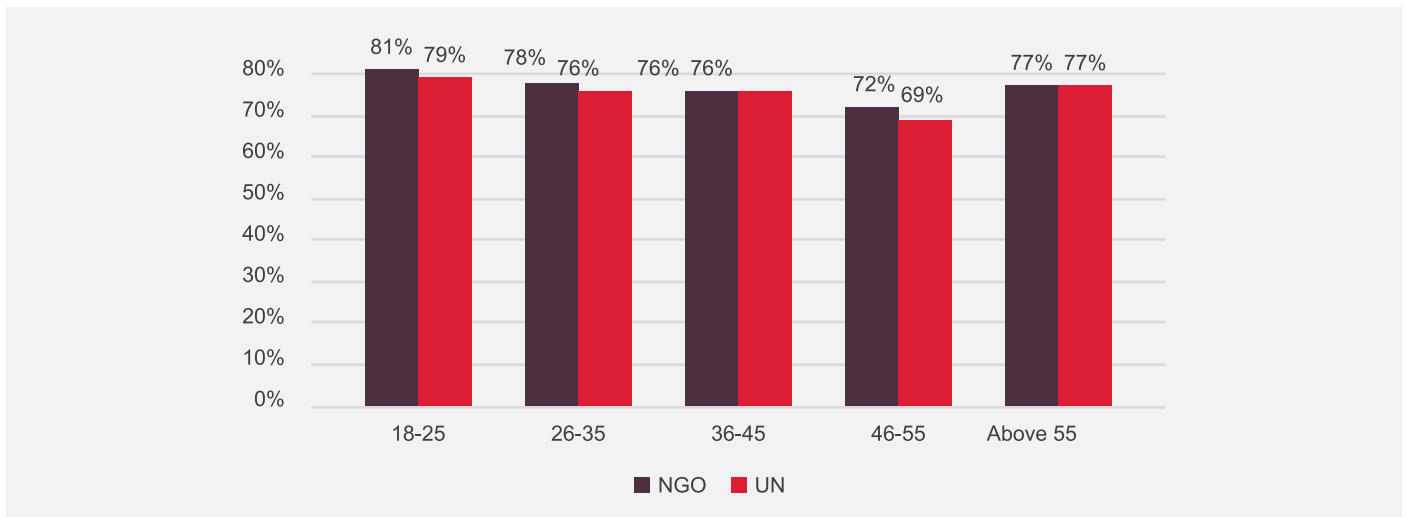


Figure 20. % of each age group who trust or strongly trust NGOs or the UN

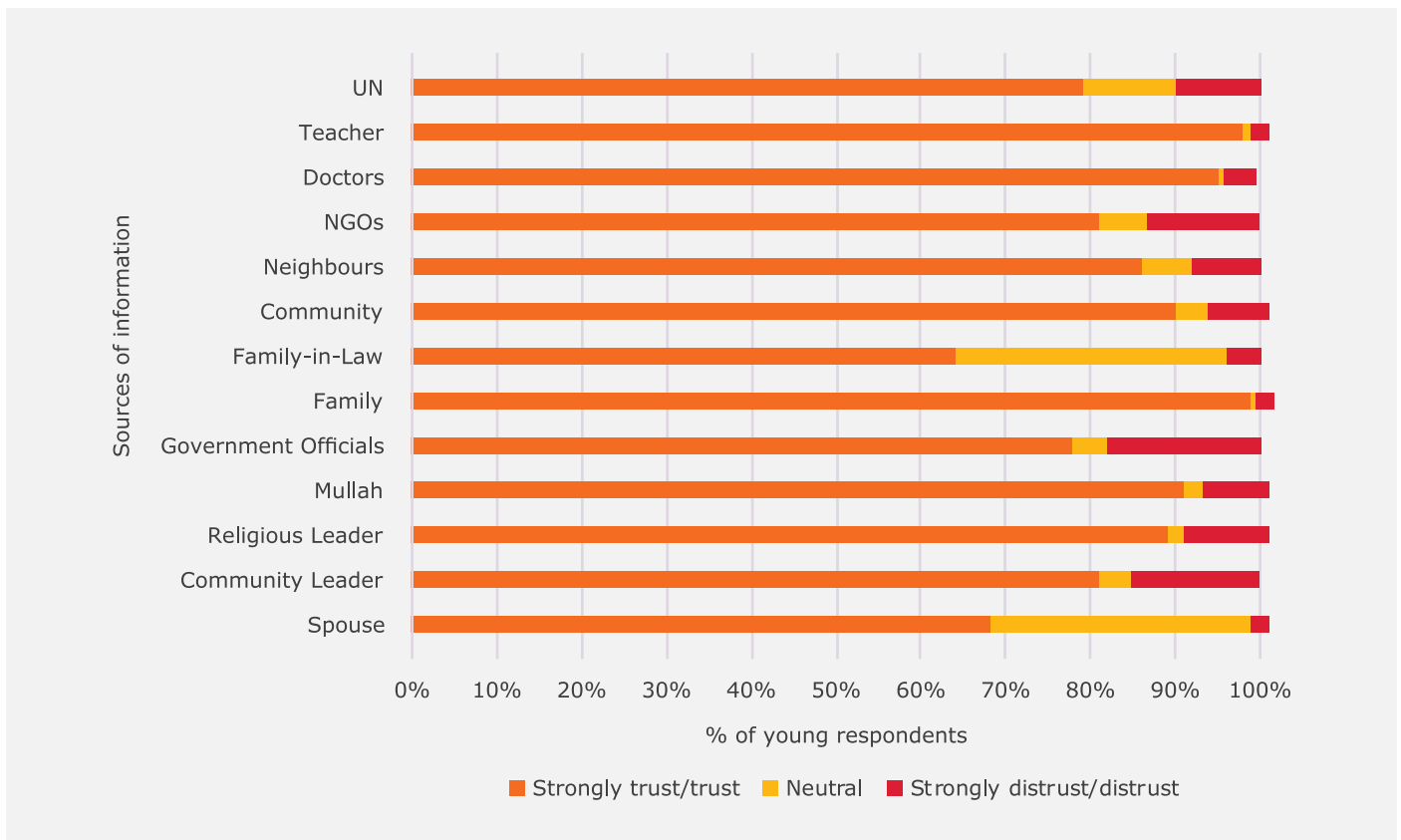


Figure 21. Who do young people trust?

Women, like men, were most likely to say they trusted their doctor. They were also more likely than men to say they trusted or strongly trusted community leaders (14 percentage points more likely), government officials (11

percentage points), and doctors (6 percentage points). Echoing this, nearly a quarter (23%) of men said they actively distrusted government officials and 21% of men actively distrusted community leaders (Figure 21).

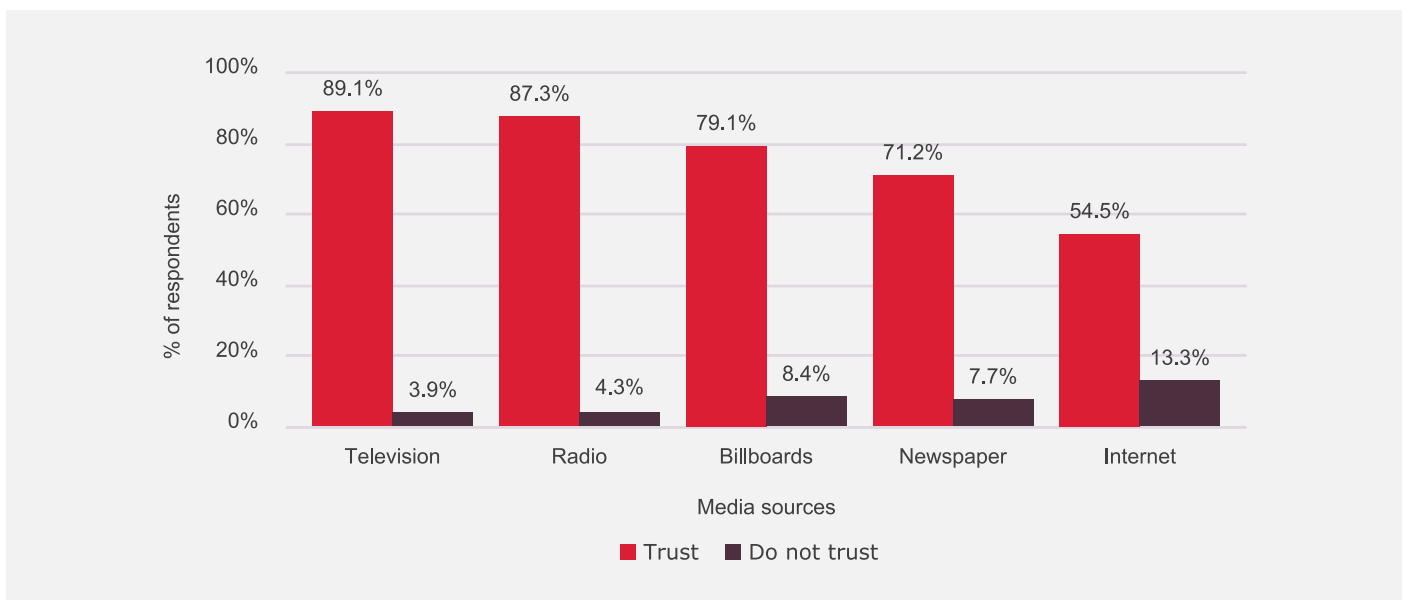


Figure 22. Men and women respondents' contrasting views of information trustworthiness

With respect to residential areas:

respondents.

- Respondents living in rural areas (23%) were more likely to strongly trust communities when compared with urban
- Respondents living in urban areas (30%) were more likely to trust the UN for information when compared with

respondents living in rural areas.

other ethnicities to say they trusted the UN, with 85% saying so compared to 74% of Pashtun and 78% of Tajik respondents.

With respect to ethnicity:

- While all ethnicities reported high levels of trust in mullahs, Pashtun respondents were more likely than other ethnicities to say that they trusted or highly trusted mullahs as a source of information, with 94% stating this compared to 88% of Tajiks, 85% of Uzbeks and 80% of Hazaras.
- Hazara respondents were much less likely than other ethnicities to say they trusted government officials, with 67% saying so compared to 78% of Pashtun respondents.
- Hazara respondents were significantly more likely than

The phone survey prompted respondents to state the extent to which they trusted each of several media sources (Figure 22). The results indicated that respondents claim to trust content seen on TV as being most credible (89%). This was followed closely by radio stations (87%), billboards (79%), and newspapers and magazines (71%).

Respondents reported having the least trust in information obtained through the internet (55%). This was not entirely driven by low levels of internet access within the sample: 42% of the 319 respondents who said they distrusted the internet also said it was the source of media they consumed the most regularly.

Figure 23. Preferred sources of media

Respondents were most likely to say they trusted information from TV. Highest trust levels were apparent among younger and female respondents. Female

respondents were generally more willing than men to report they trusted media sources (Figure 23 and Figure 24).

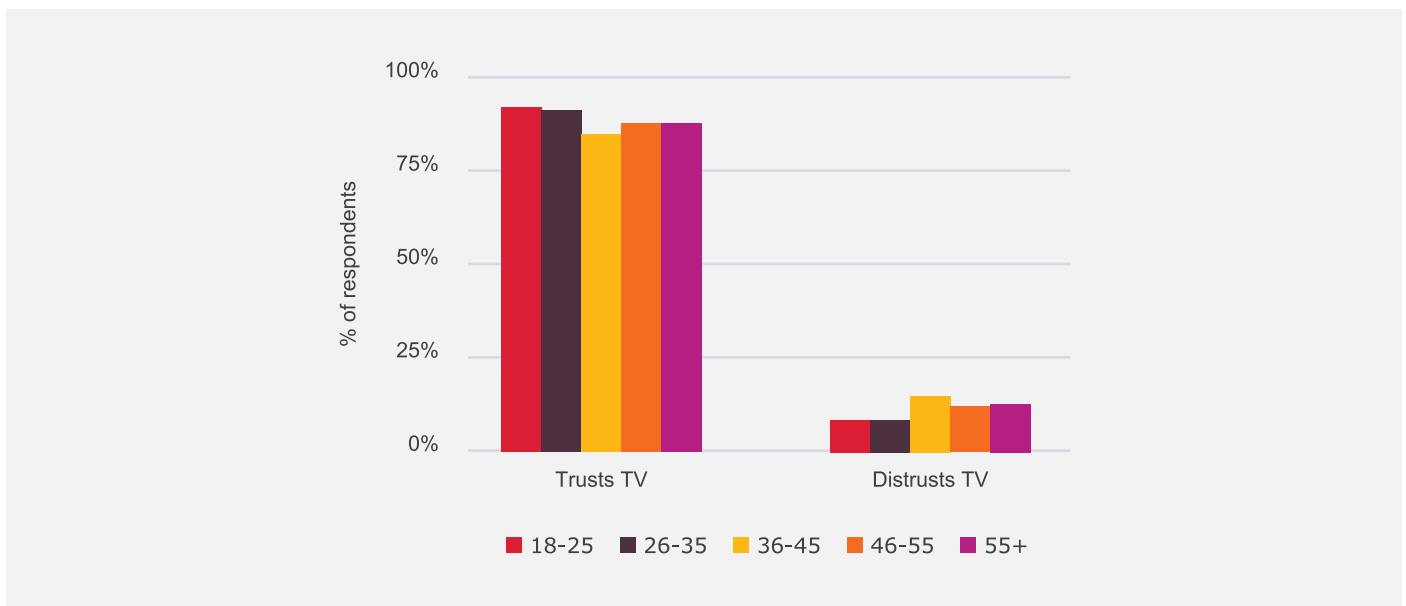


Figure 24. Trust of information from television, by age

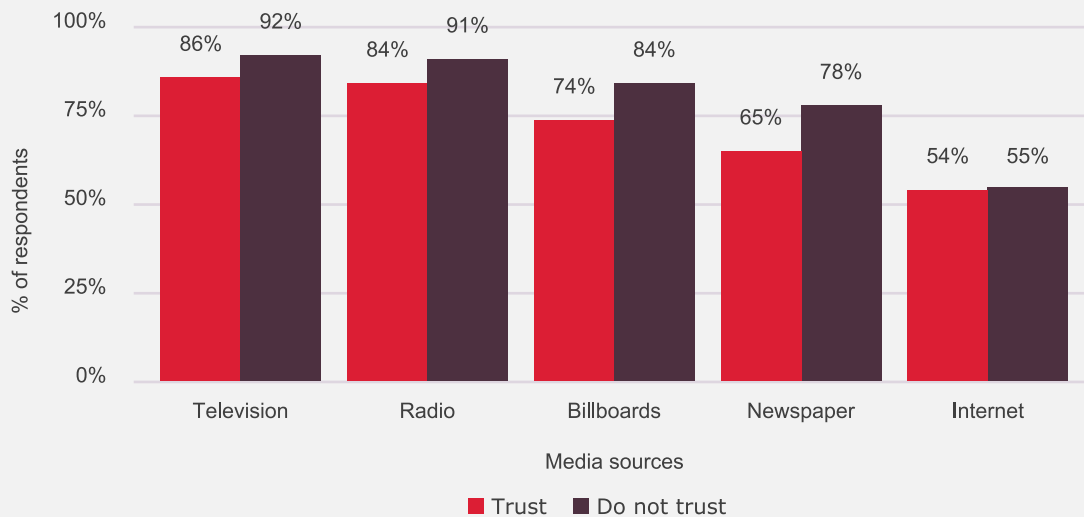


Figure 25. Trust of media, by gender

Respondents living in urban areas (42%) were also more likely to show high levels of trust in information obtained from TV, as were those who had attended at least some formal education. While only 37% of rural dwellers claimed

to trust the TV, they were more likely to trust information displayed on billboards (16%, compared to 13% of urban dwellers) and obtained directly from their communities (23%, compared to 18% of urban dwellers).

INFORMATION ON JUSTICE AND SECURITY SERVICES

The ease of access to information on justice and security services was assessed exclusively via the phone survey.

Section V: Awareness of Available Justice and Security Services

Respondents mostly (72%) knew how to call the police. Male respondents (85%) (Figure 25)

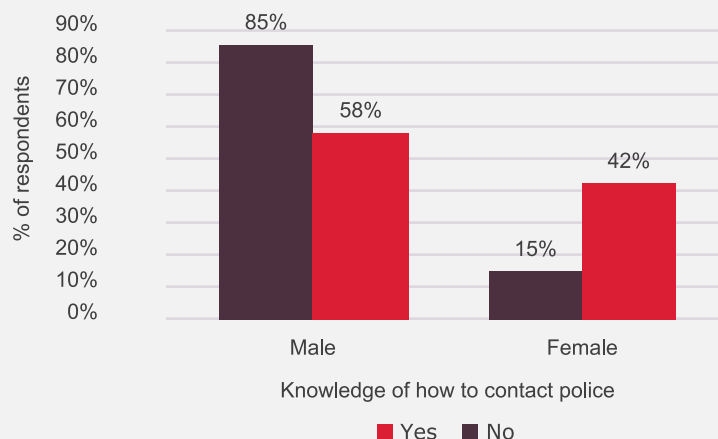


Figure 26. Knowledge of contacting police by gender

Respondents living in urban areas (78% of 802) and ethnic *Tajiks* (76%) were more likely than average to know how to do this. Respondents without formal education (44% of 961) and respondents who were unemployed (37% of 1,138) were less likely to have information about contacting

police services.

Respondents who knew how to call the police mostly found out from TV. Over half (56%) reported having obtained information on how to call the police while

watching TV. 26% heard instructions on accessing police services on the radio. **However, a greater proportion of**

respondents (78%) knew where their local station was. (Figure 27)

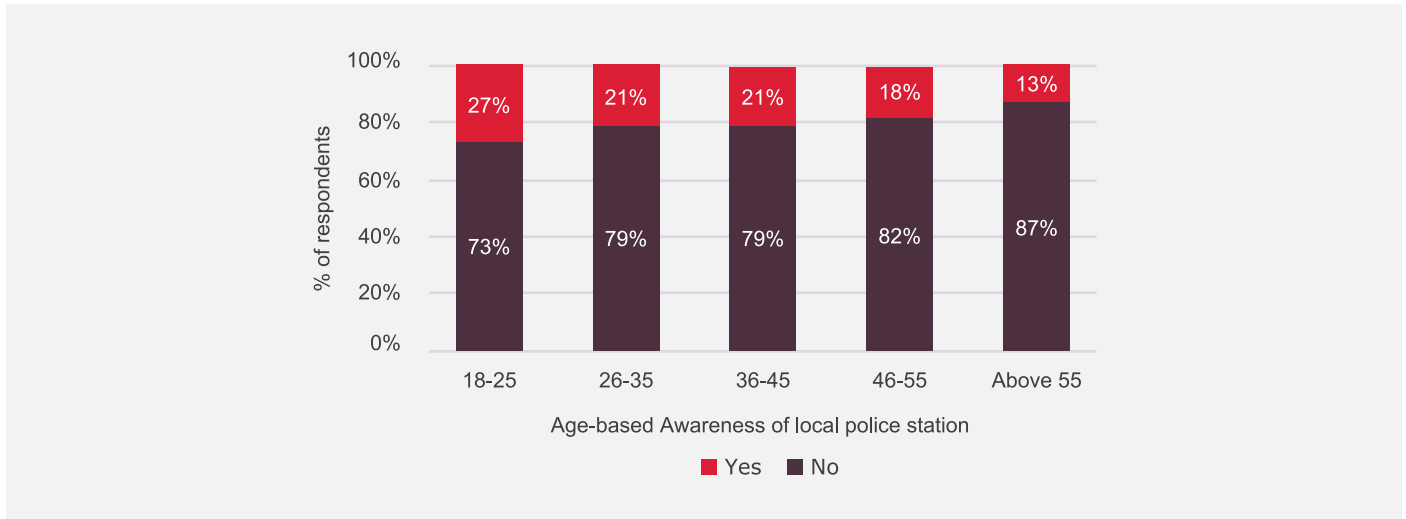


Figure 27. Knowledge of contacting police by gender

Respondents within the age range of 18-25 years were the least likely (27% or 812) to know, as were female respondents (36%). Fewer, though still a majority (63%), knew where their local court was, with ignorance highest among younger respondents and women respondents, with just 53% of 18-25s saying they were aware, and 45% of women saying so.

In a similar pattern to knowing how to contact security services, respondents with some formal education or in urban areas (82% of 802) were likely to know where they could access police services, compared to those living in rural areas.

Section VI: Trust in Security and Justice Services and Information

When respondents were asked specifically which source they would find most trustworthy about police activities in their area, TV and radio were most cited and more widely than the otherwise highly trusted family and friends group (Figure 28). Yet when asked about each source of information individually, family and friends were again widely trusted, with 95% saying they trusted or strongly trusted family or friends.

In terms of other institutions and people, 85% said they would trust information about police activities from the ANP themselves, leaving them marginally more trusted than government officials on this subject (81%). NGOs (76%) and the UN (75%) were less often considered trustworthy sources of information on police activities (Figure 29). There

was no significant difference here between urban and rural or male and female respondents. While *Hazaras* were more trusting of communications from the UN, for police-specific information there was no significant difference.

In terms of media sources, television was nonetheless credible (86%), followed by radio (82%), flyers and brochures (65%) – only half (53%) said they could trust information about the police from social media. This seems to make it highly likely that information heard on TV will then be discussed and verified with family and friends. Conversely, information about ANP activities or achievements delivered online will be more often met with scepticism.

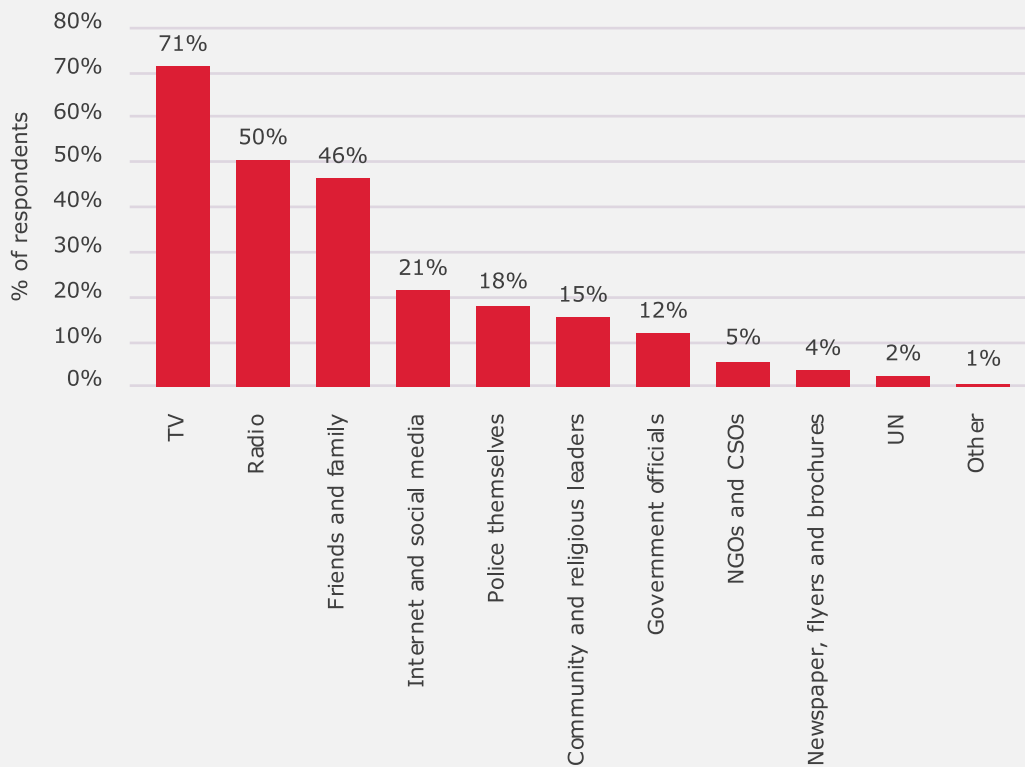


Figure 28. Most trusted sources of information about police activities in the area

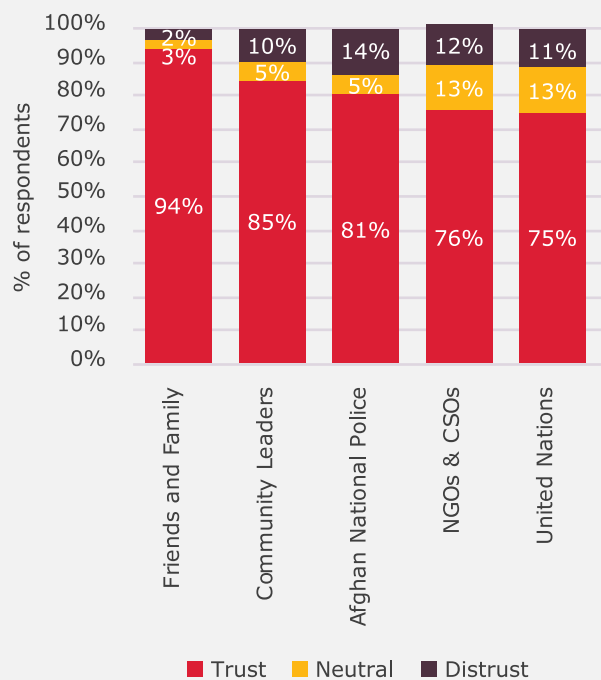


Figure 29. Extent to which each source of information on police activities is trusted

Respondents again most frequently reported TV as the most important source for information, 69% saying it was their information source for justice services. This was followed by radio (48%), friends and family (47%), internet and social media (21%), community and religious

leaders (17%), government officials (13%), police (12%), NGOs and CSOs (5%), newspapers, flyers and brochures (4%), and the UN (3%). Unexpectedly, when respondents were asked to rate the degree to which they trusted information about justice services that they received from

the radio, respondents aged 18-25 years (28% of 812) were more likely than all other age categories to report strongly trusting this information.

Section VII: Frequency of Interaction with Justice and Security Services

Less than one in five (17%) respondents said they had ever used a police service (Figure 30).

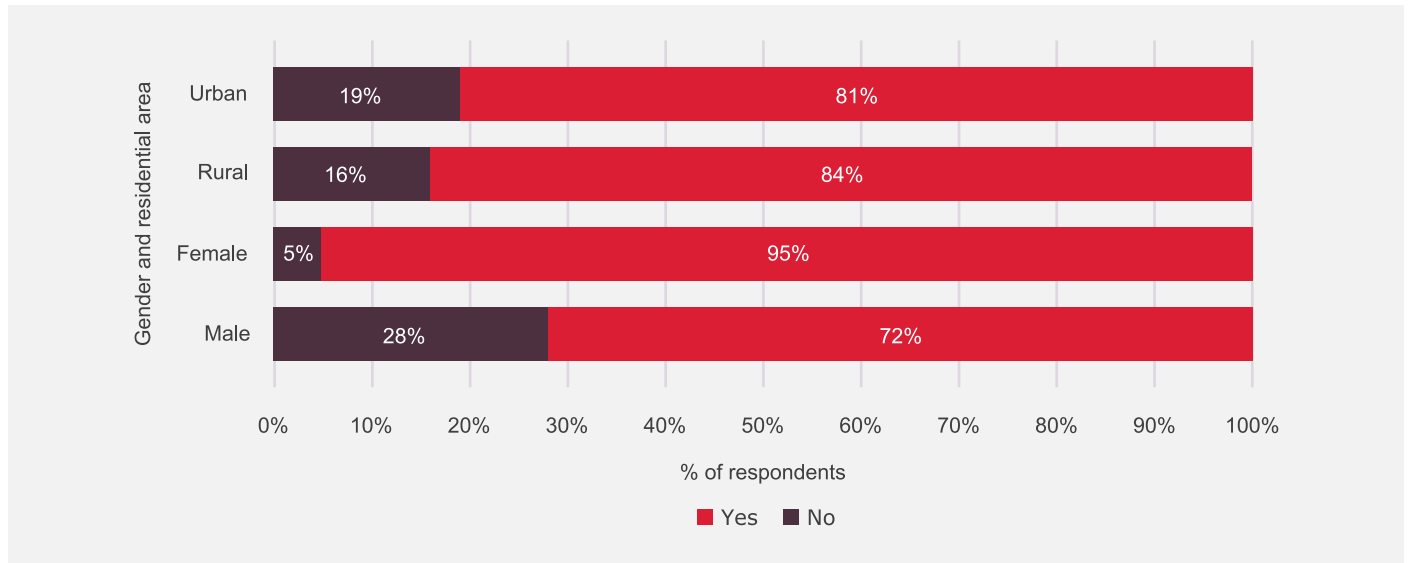


Figure 30. Usage of police services

More male respondents (28%) had gone to or called the police, compared to just 5% of women respondents. Respondents with no formal education were among

the least likely to have accessed a police service. Just over one in ten (11%) reported ever having done so.

A similarly low proportion (25%) said they had accessed a justice service, dropping to just 12% of women, which contrasts with the 38% of men who had accessed a justice service at least once (Figure 31).

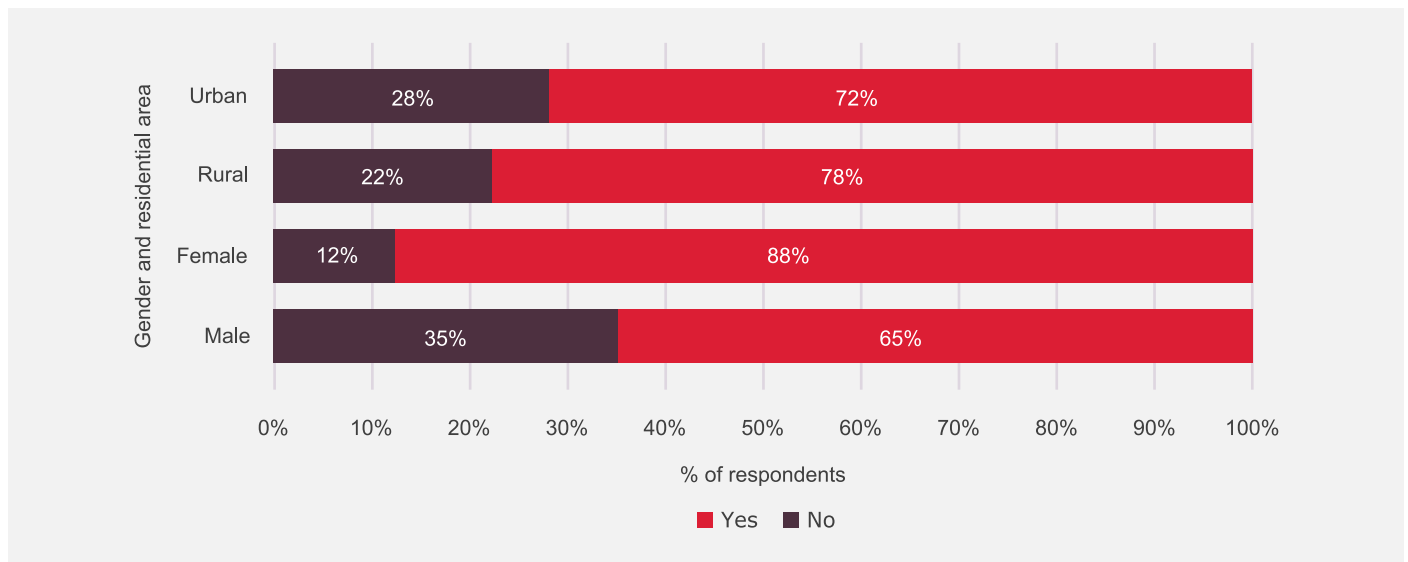


Figure 31. Usage of justice services

Of the respondents who had accessed a justice service, just under half (45%) had done so in the last year. Eighteen respondents were using a justice service at the time of the survey, none of them women. Furthermore, only 24%

respondents had been to the courts. Of these, participants between the age of 18-25 years were least likely to have visited the court (86% had never visited the court).

Section VIII: Satisfaction with Existing Information Regarding Justice and Security Services

In order to gauge respondents' satisfaction with existing information about justice and security services, the survey asked respondents about:

- Their awareness of how to contact and reach the ANP
- The extent to which they trusted information about the

police from various sources

- Experiences with and trust of local, formal justice institutions
- The type of information they would like to have access to

Most respondents (65%) felt that existing information about justice services in their community was insufficient. Several groups in particular felt dissatisfied (Figure 32)

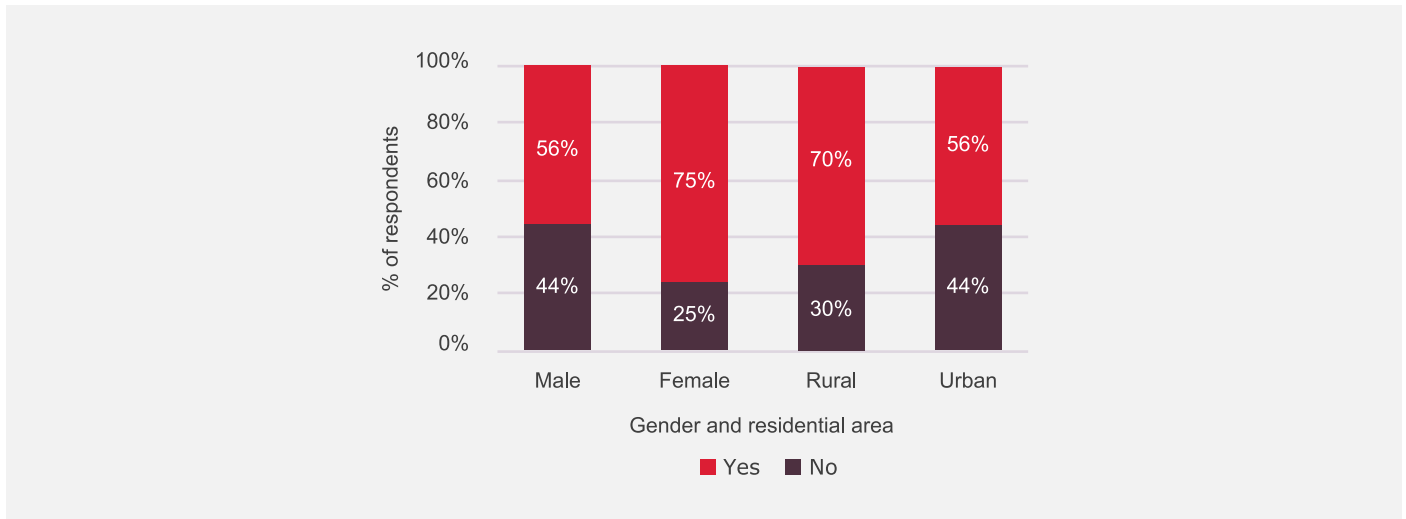


Figure 32. Satisfaction with current information about justice services

- Respondents within the age groups of 18-25 years (69% of 812), 26-35 years (63% of 684) and 36 to 45 years (68% of 494) were more likely to have felt this way
- Female respondents (75% of 1159) compared to 56% of male respondents
- Respondents living in rural areas (70%) compared to urban (56%)
- Respondents who had no formal education (72% of 961)
- Respondents who were categorized as being unemployed or students also communicated a higher degree of dissatisfaction (72% of 1138 and 71% of 96)

Most respondents (73% of 1,163) who wanted more information said that it would be most useful to know more about the procedures and rules of using justice services. This was followed by 51% who wanted to know the address and contact details of courts, department of justice offices and other government departments, 35%

who wanted information about the changes in the system, 34% who wanted information about the improvements made in the existing system, 32% who wanted information about the costs associated with accessing justice services, 31% who wanted information about the duration of services, 25% who wanted information about their own case, and 14% who wanted information about citizen feedback mechanisms in place.¹²

The majority of respondents (81%) said information on accessing justice and security services would be best delivered via TV. There is also a place for radio, mentioned by 66% of respondents, as well as friends and family (46%), internet and social media (37%), community and religious leaders (23%), Government officials (14%), Newspapers, flyers or brochures (10%), police (10%), NGOs and CSOs (4%), and the UN (3%). The participants' choice of medium for receiving information corresponded with their current trust in and usage of media sources.

12. The data collection team noted that when they initially asked this question without prompting, respondents were not sure how to answer, and the enumerators then supplied some examples of types of information that respondents could mention.

PART II: INTERNET USERS

Insights from the in-app internet survey form the basis of results in Part II. They provide a deep dive into media consumption habits of smartphone internet users. While a relatively small audience in Afghanistan, they are an

audience of particular interest as they are more urban, more educated and likely more engaged and vocal with regards to the government and the future state of affairs in Afghanistan.

SECTION I: USE OF MEDIA SOURCES

As might be somewhat expected with an internet-based survey, respondents' most used media platforms were internet-based 65%: named social media and 46% said

other internet websites were their most used platform, with TV at only .33%. This held across age and gender groups and between disabled and non-disabled respondents.

Internet Usage

Respondents—all of whom had internet access—overwhelmingly accessed the internet through smartphones (94%) and via cellular data (62%), rather than via WiFi (17%). A small proportion used laptops (8%), tablets (5%), and desktop computers (3%).

Male respondents appeared more likely to use smartphones to access the internet. 95% of men used a smartphone compared to 89% of women. All age groups predominantly used smartphones, with laptop use highest among 36-49-year olds (16%).

TV Usage

Over half (55%) of respondents to the survey watched TV for less than two hours per day. Respondents most frequently (28%) reported spending less than an hour or one to two hours per day (27%) watching TV.

Respondents with a disability more often said they spent time watching TV (41% compared to 31% without disability). They **were also more likely to watch it for longer, 24% saying they spent more than four hours a day watching TV** than those without a disability (10%).

Older respondents and female respondents also watched TV for longer. Around one in ten (11%) of respondents above 50 years of age watched TV for more than six hours a day compared to just 4% of respondents aged 18 to 25, and the 5% of those aged 26 to 35. Female respondents were more likely to spend more than six hours a day watching TV than their male counterparts, though few respondents from both groups reported watching this much TV in general (9% of women, compared to 4% of men).

Radio Usage

Most (83%) respondents spent less than two hours day listening to the radio. Respondents were more likely to spend longer listening to the radio if they were older: 24% of respondents aged above 50 spent more than three hours a day on the radio, while only 11% of respondents aged 18 to 25 reported doing so.

Respondents with a disability were both more likely to listen to the radio (31% compared to 12% without a disability) and to listen for longer, 43% of disabled respondents listening for two hours or more every day.

Behaviour Online

Respondents mostly used the internet to access social media (64%). This was followed by email (24%), entertainment (20%), news websites (20%), gaming (17%) and retail websites (15%). Male respondents were more likely to use the internet to access news websites (22% of male respondents) than female respondents (13% of women).

The most popular social media was Facebook (64% of

respondents saying they used this platform), followed by WhatsApp (60%), Facebook Messenger (57%), Instagram (40%) and YouTube (40%). There are telling patterns by age and gender:

- Younger respondents said they accessed social media more and through different platforms. Respondents aged 26-35 were more likely to use Facebook than the rest (82% of respondents aged 26-35), and they were

more likely to use YouTube than respondents aged 18-25 (49% of respondents aged 18-25, compared to 38% or 223 of 585).

respondents to use Facebook (70% compared to 40%) Figure 33, and Facebook Messenger (40% compared to 35%).

- Respondents aged 18-25 are more likely to use Instagram than those aged 26-35 (43% or 251 of 585 respondents aged 18-25, compared to 39% or 57 of 147 respondents aged 26-35).
- Male respondents were more likely than female respondents to use Facebook (70% compared to 40%) Figure 33, and Facebook Messenger (40% compared to 35%).
- Female respondents claimed to use “Whatsapp”, Instagram and TikTok more frequently than men (66% or 105, 46% or 72 and 33% or 52 female respondents; compared to 59% or 383, 39% or 254 and 28% or 184 male respondents, respectively).

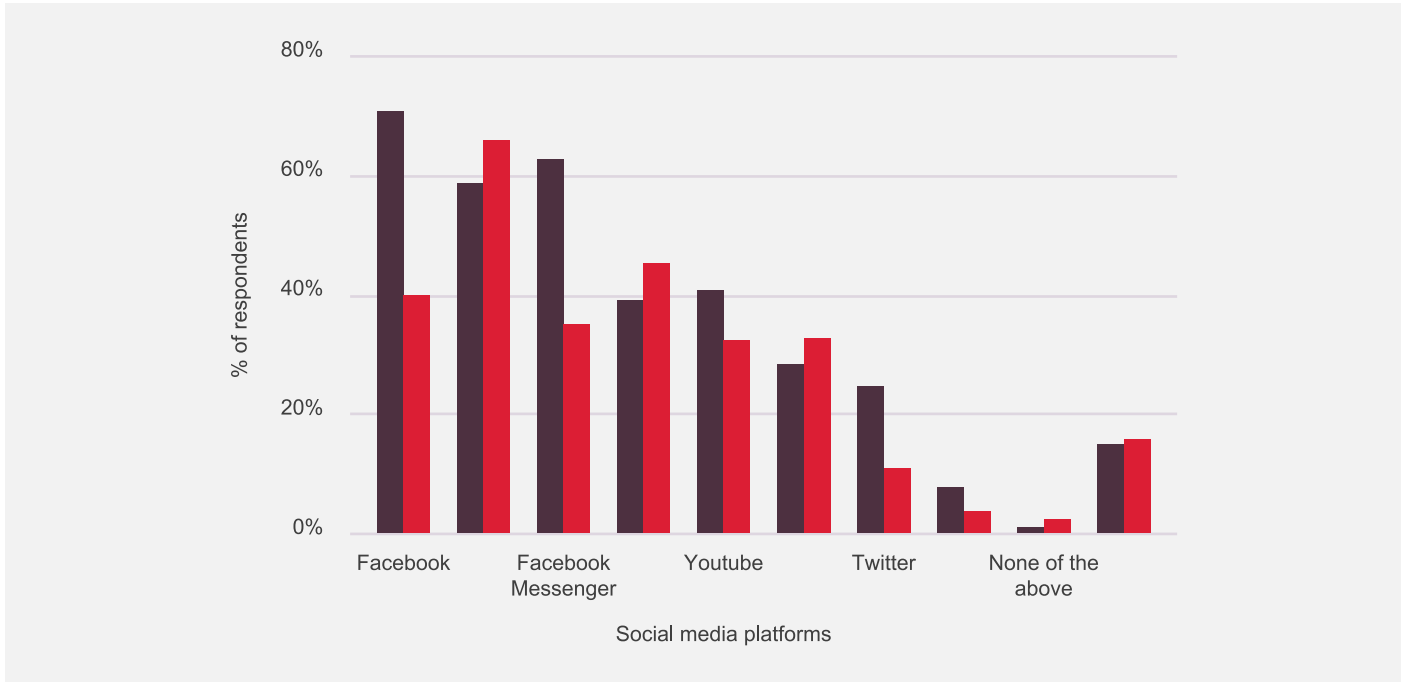


Figure 33. Social media preferences by gender

Respondents reported spending an average of 2.8 hours per day on the internet (Figure 34). Older respondents with internet access appear to spend longer on social media than younger respondents. This aligns with other data from the same survey showing that 62% of respondents reported they spend between one and four hours a day on social media.

The longest time on social media was spent by women and respondents over 50. 25% of respondents aged over 50 (11 of 44) were more likely to spend more than 6 hours per day on social media than those aged 18-25 (13%, 74 of 585). Female respondents were more likely to spend more than six hours a day on the internet than male respondents (15% of women; 9% of men).

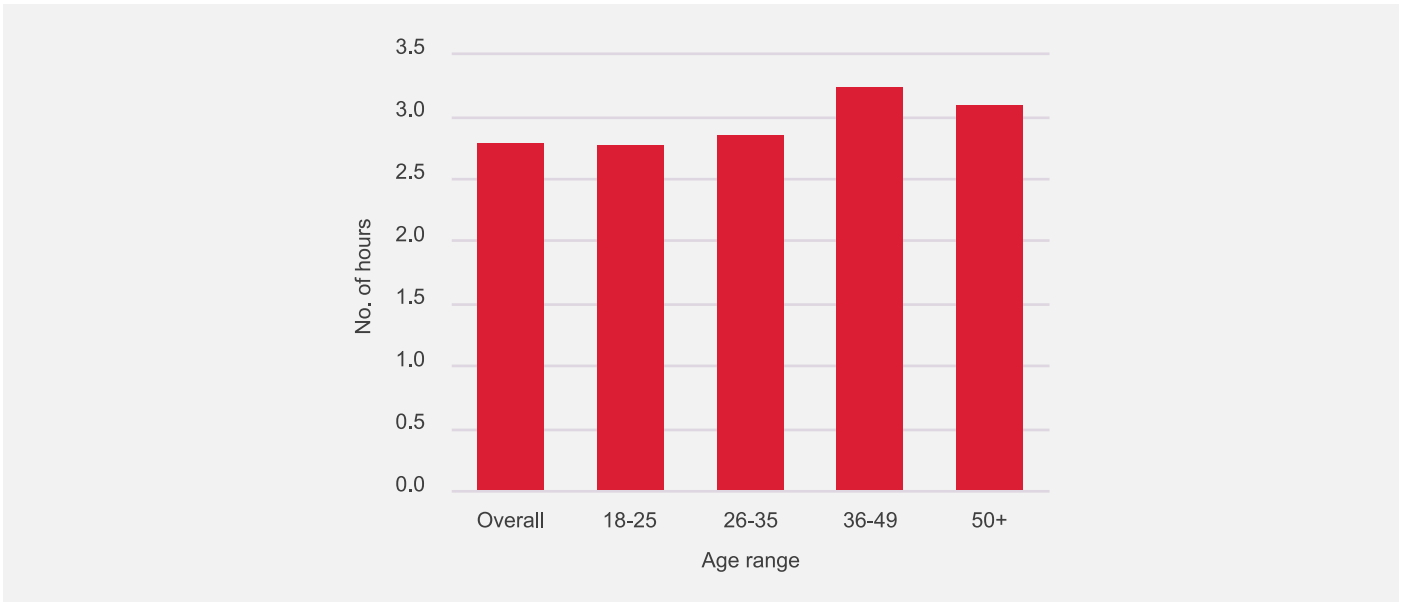


Figure 34. Average hours respondents reported spending spent online, by age

SECTION II: REASONS FOR USING MEDIA SOURCES

The internet survey examined respondents' reasons for using the internet and their reasons for using social media networks.

Respondents mostly claimed to use the internet to communicate with friends and family (50%), to be informed and get the news (38%), to have fun (e.g. watch shows, gaming, etc.) (32%), for work (31%), and for public announcements (19%).

Respondents aged between 26 and 35 years old were more likely to use the internet to be informed and get the news (50%) of respondents aged (26-35 than those aged 35%) 18-25 of respondents aged (18-25 and above 50 30%) of respondents aged above. (50

Young respondents aged 18 to 25 years old were more likely to use the Internet to communicate with friends and family (50%) of respondents aged (18-25 and for fun (34%) than respondents aged above 27%) 50 of respondents aged ,+50 and ,18% respectively. (

Whereas female respondents were more likely to use the internet to communicate with friends and family (61%) of women, which contrasts with the 47% of men, (male respondents were more likely to use the Internet to be informed 40%) of men 29%; of women. (

When asked about social media specifically, most respondents said they use social media to see what their friends were doing (46%) or 368 of (797 to get the news, (42%) to get the latest information about fashion, music, films and sports, (38%) to follow famous people (32%) and for political discussions. (26%)

Respondents aged 26 to 35 years old were more likely to use social media to get the news (58%) of respondents aged (26-35 than respondents aged 44%) 18-25 of respondents aged (18-25 and over 50 years old 30%) of respondents above. (50 Male respondents were more likely to use social media to get the news than their female counterparts (44%) of male respondents 32%; of female respondents. (

SECTION III: PREFERENCE FOR MEDIA SOURCES

When asked how they got their news, the vast majority (79%) of respondents said they consulted the internet. Respondents also frequently cited television (42%), friends

(29%), family (23%), and religious leaders or the mosque (15%) as other common sources of information and news.

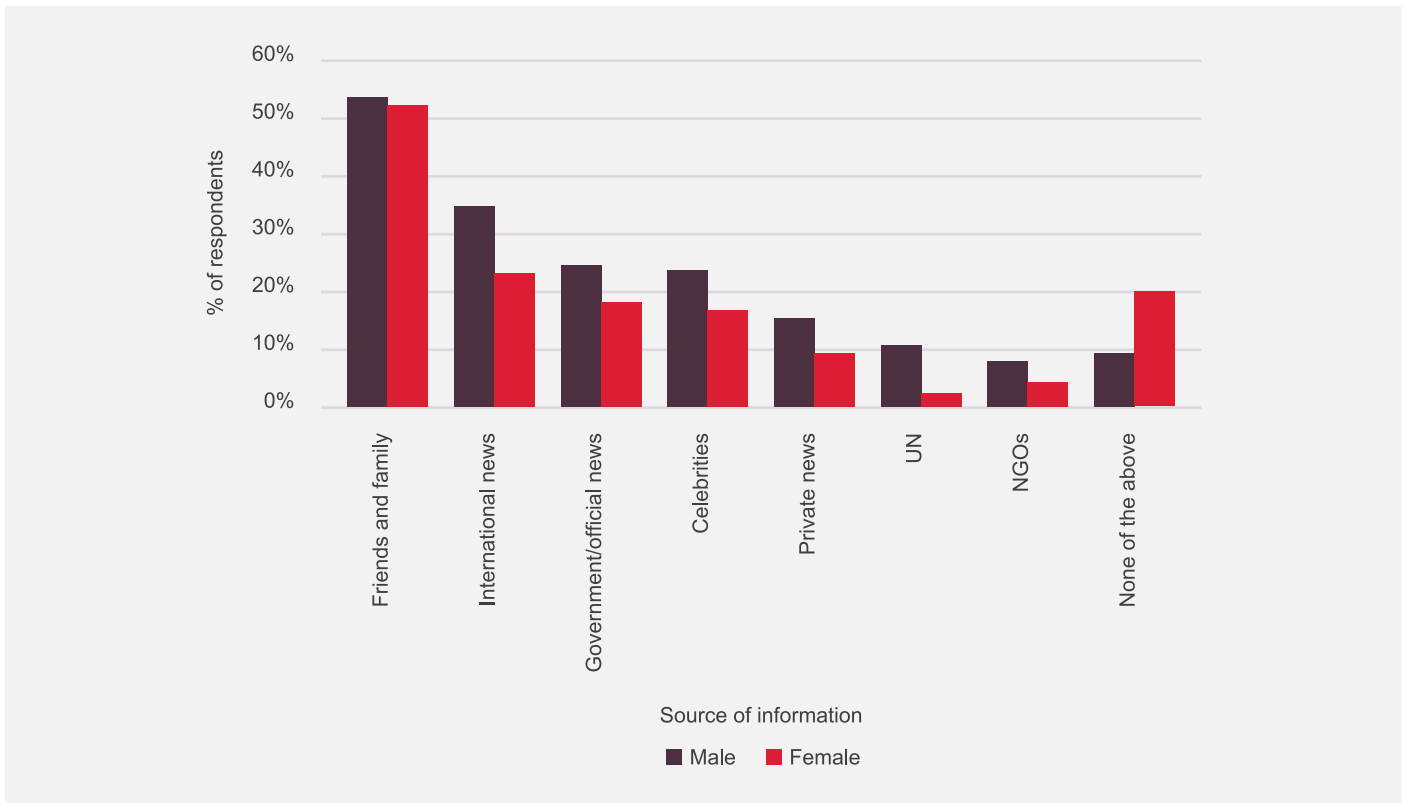


Figure 35. Trusted sources of information

While all age groups preferred the internet, respondents heavily consulted television programmes (42%), friends (29%), and family (23%) to obtain most news and information. Respondents aged 26-49 were most likely to mention television as a news source (50% or 89 of 178), while the youngest and oldest respondents were most likely to consult family: 25% of 18-25 year olds and 27% (12 out of 44) over 50s. Proportionally, more female respondents obtained news and information from their families (28% or 44 of 158 women) than their male counterparts (21% or 139 of 651 men). In contrast, male respondents were more likely to obtain news and information from friends (30%) and religious leaders/the mosque (18%) when compared to females (22% and 6%, respectively).

Respondents with a disability were less likely to cite the internet as a primary news source (65% compared to 82% of those without a disability). Respondents with a disability were more likely to make use of religious leaders/the mosque (23%), the radio (16%) and community shuras (12%).

The highest proportion of respondents who preferred using the internet to other sources of information lived in Kandahar (88% or 45 out of 51). Respondents living in Kabul (44%), Balkh (51%), Herat (38%) and Nangahar (39%) preferred getting information and news from the TV when compared to those who lived in Kandahar (14% of 51).

Respondents claimed they are more likely to use online rather than offline sources to obtain Afghan (43%) and

international news (36%). Respondents were less likely to use online sources to get updates about friends and family (31%), educational content (26%) and religious information (24%). Male respondents were more likely to use online sources to keep updated on news about Afghanistan (46% or 299 of 650 male respondents) and access educational content (28% or 182) than female respondents (28% or 45 of 158 female respondents and 20% or 32, respectively).

Overall, for both genders, over half (54%) of the respondents said family and friends were the most credible online source. After this, the next most credible sources of online information were international news (33%) and government/official news (23%). Celebrities (22%), the UN (14%), and private news (9%) and NGOs (7%) were less important.

Respondents' views on the credibility of information sources differed by age, gender and between respondents with or without a disability:

- Respondents aged 18-25 found celebrities (23% or 133 of 586 respondents) slightly more trustworthy than government/official news online (22%). Respondents with a disability agreed, 22% trusting celebrities over 20% trusting government institutions.
- Respondents with a disability were also more likely to trust online information coming from NGOs (14% or 19 of 135) than respondents without a disability (6% or 41 of 674).
- Respondents aged 26-35 were more likely to trust

international news (44% or 64 of 147) and government/official news (33%) more than those aged 18-25 (30% or 174 of 586 respondents aged 18-25 and 22% or 126, respectively).

- Respondents aged 36-49 claimed to find the online presence of UN institutions (26% or 8 of 31 respondents) more credible than that of the government (19% or 6) and celebrities (16% or 5).

- Male respondents claimed to trust government/official news (25% or 161 of 651) more than their female counterparts (18% or 29 of 158), and were more likely to trust international news (35%) and private news (11%) than female respondents (23% and 3%, respectively).
- Female respondents were more likely to not trust any of the aforementioned sources online (20%) when compared with male respondents (10%).

SECTION IV: MOST CREDIBLE SOCIAL MEDIA SOURCES

Overall, respondents trusted information on Facebook (41%) above all other social media. This was followed by their trust in information from Twitter (36%), WhatsApp (19%), YouTube (18%) and Instagram (17%).

Responses showed that different age groups tend to perceive online media differently (Figure 36):

- Facebook was proportionally less trusted among

younger respondents: 39% of 18-25s ranked it first, compared to 47% of 26-35s and 58% of 36-49s.

- Twitter is consistently trusted across age groups.
- Younger respondents were more willing to trust a broad range of social media, around a fifth of 18-25s each pointing to WhatsApp, Youtube and Instagram as the most trustworthy source of information.

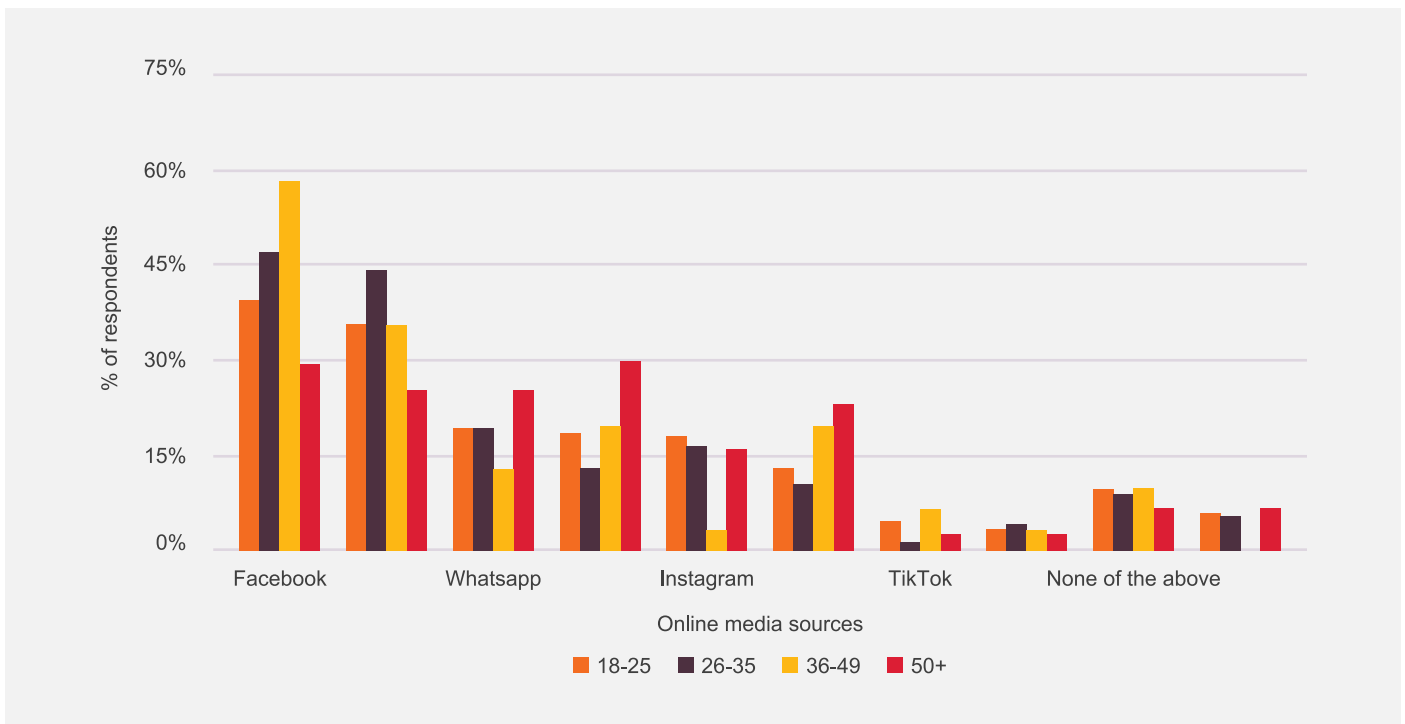


Figure 36. Trustworthy sources of online media, by age

Female respondents were more likely to distrust the information included on any of the aforementioned social media channels (16%) than male respondents (8%). Female respondents claimed to find Instagram (21%) more trustworthy than WhatsApp (19%) and YouTube (18%). Male respondents were more likely to trust Twitter (40%) than their female counterparts (22%).

Respondents from Kabul (21% or 47 of 226) and Herat (18% or 14 of 78) found Instagram more trustworthy than WhatsApp (18% and 17%, respectively) and YouTube

(19% and 15%, respectively). Respondents from Nangahar (45% or 34 of 75) were more likely to claim that they trusted Twitter than those from Herat (26% or 20%).

Offline sources of information were nonetheless important for respondents to this internet-based survey (Figure 37). Only 43% of respondents said they were more likely to get news and information from online over offline sources suggesting that the other 57% continue to value offline sources more.

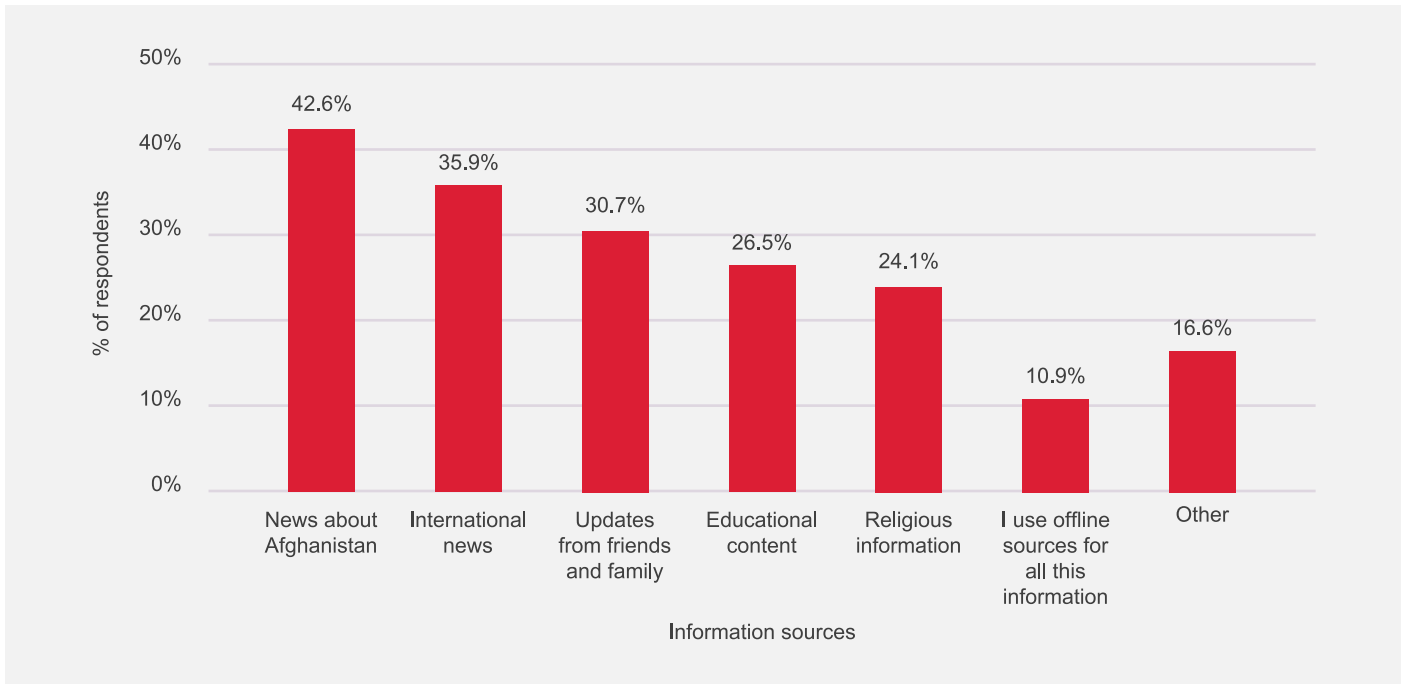


Figure 37. Types of information more often taken from online rather than offline sources

Awareness of the Taliban Online

Most of the sample (62%) had not seen content from the Taliban on social media. Some groups were more likely to have seen Taliban content:

- 68% of disabled respondents.
- 40% of men compared to 28% of women

Respondents were generally unwilling to answer what people's feelings might be on seeing such content55% , saying they did not know.

CONCLUSION

The survey reported results from an automated, online survey of 809 respondents using the in-app polling software and a conventional telephone survey of 2,403. While sampling means results cannot be generalised to the national population of Afghanistan, they provide sufficiently robust insight to give stakeholders clear direction on how to use mass media, social media and offline channels, such as trusted individuals, to reach groups excluded from the security and justice services to which they are entitled.

By way of conclusion, this section addresses again the two research questions presented at the start of this study. The first research question was as follows:

- What are the overall trends in media preferences and consumption among the Afghan public?

Results from the nationwide phone survey suggest that TV is the dominant medium of obtaining information in Afghanistan. However, despite this the internet and radio remain highly relevant. The internet appears to be a popular media channel amongst those who have access, TV and radio are consumed across genders, ages, localities and educational backgrounds.

Among those who do have access to the internet, online media is overwhelmingly consumed via smartphones and cellular data. The implication of this is that high-bandwidth communications products will find a limited audience.

Despite the rapid uptake of online media in recent years, conversations between trusted people (offline and online) received the highest number of endorsements from

respondents to the nationwide survey, and the internet-based survey echoed this. When it comes to important information, results from both surveys showed that people considered family members and friends to be the most trustworthy source of information and ascribed credibility to a wide range of individuals within their community, in particular teachers and doctors.

The second research question was as follows:

- How does the Afghan public access information on justice and security-related services?

While men and those living in urban areas appear broadly aware of existing justice and security services and how to access them, the general consensus among respondents was that the available information on access to security and justice services is not satisfactory. People would like to attain more information about available services, including how to access them and the costs of doing so. Rural, female, and uneducated respondents were least likely to know how to access security and justice services.

Expanding media penetration and use in Afghanistan presents an opportunity for stakeholders, including the Afghan government and UNDP LOTFA to utilise these channels to improve communication with citizens, especially vis-à-vis justice and security services, which are a critical element of the social contract between a state and its citizens.

